Globe Bank INTERNATIONAL

Social Media Training Manual

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Purpose and Mission of this Document

These social media account guidelines are a fluid reference document for all employees who post and comment on our Globe Bank company accounts. We have broken it down into several categories ranging from our company's common-sense policies to tactical specifics for each platform.

Defining Policies and Guidelines

Before we get into specifics of what and how we post to various platforms, it's important to differentiate between *policies* and *guidelines*.

Policies

A social media policy is much like any other company policy that we have at Globe Bank: it is a tenet that we have determined is best for our company and how it is represented, and we follow it to the best of our ability. We follow policy that our management has approved after consultation with those in our company who have expertise in particular areas relevant to the policy.

Guidelines

Guidelines are the best practices that we have used and refined in our use of social media, marketing methodologies, analytics, and other aspects of this developing field of communications. Following these guidelines helps us communicate what we want to whom we want to target. They also help us discover important aspects of our customer and potential customer demographics that will help us serve them better.

Why Globe Bank is on Social Media

Our presence on social media has many different purposes and benefits. It takes a lot of work to maintain our social media accounts, and it is worth it because we have had what we define as successful growth in visibility and interaction with the public.

Brand awareness

It's a safe bet that most, if not all, businesses on social media are there to grow brand awareness and gain exponential visibility for their company and brand. We are not the exception: We want more people to know about us!

Product awareness

We use social media to promote and discuss our products. It's a great opportunity to discuss details, background, sales, current and new products, and product uses.

Community building

We value our customers, and social media allows us the opportunity to grow real communities interested in our products. We can ask a question of our community and get answers in real-

time. We can discuss topics that run the gamut. We encourage feedback and ideas. We embrace our brand ambassadors and encourage them to engage with us. For example, there is an independently run Facebook Group called "Fans of Globe Bank" whose members share stories and experiences with our products and discuss new and traditional uses for products. We participate in discussions routinely and maintain a good working relationship with the group's administrators.

Advertising

We advertise on social media on a regular basis. Through advertising, we can target advertisements to very specific audiences on each of these platforms. Our goal is to make our ads as authentic as our posts: avoiding hype and offering real value to customers.

Sales leads

Both our advertisements and posts provide wide-ranging sales leads. Many of our ads encourage followers to join our mailing list to opt into receiving our exclusive newsletter that offers coupons and deals. This list is used by our sales team to target specific audiences by location and preference, and other data that we have in our database that people give us.

Our Audience

There is a reason that understanding social media audiences have spawned so many careers and products to help analyze, assess, and address who the audience is and what they want from us. In the most general of terms, our audience is composed of people and organizations that are in some way connected to our company as customers, potential customers, wholesalers, distributors, current employees, potential hires, and/or press. Each of these audience categories has its own subcategories, some with sub-subcategories seemingly ad infinitum.
This guide will not be delving into the specifics of our current audience. Why? Because even if the trends may stay somewhat stable over time, there are too many variables to go into in this document that could possibly be outdated by tomorrow. The point of having fluid analytics is to understand our audience in a specific, current timeframe, to proceed appropriately.
This document focuses on the generalities we discover with each platform we contribute to and publish on, including posting blog posts on our own site. In this way, we can use what we learn from the analytics and information about our audience and prepare content accordingly to match what works best at a given time.

Writing Guidelines

In this section, we'll be referring to 'our voice'. What do we mean by that? Our voice is how we communicate as a company to our customers, prospective customers, wholesalers, and one another. Our voice is based on our tone, our language, and even our use of punctuation.

Be Authentic

When we are authentic, honest, and real, we are better able to relate to our audience. Above all, Globe Bank prides itself on communicating and providing genuine content that is relevant to

our followers no matter what the media. This is a priority and has been since our company was founded.

Remember Where You Are

When you create a post or compose a comment to answer a customer or potential customer, remember the context in which you are communicating. If the platform only allows for a certain number of characters, stay within that limitation. If the platform is highly visual, using a visual (when appropriate) to answer an inquiry is fine if it will communicate necessary information. Avoid multiple or overly lengthy replies that may confuse the reader. Focus on exactly what is being asked and answer it rather than assuming what the reader "really" means. Your opinion of what they *should be* asking isn't valid or respectful—answer what they ask. If it is not clear, respond that you do not understand what they are asking.

Keep it Simple

Keeping it simple means just that. Use language that is easy to understand and explains what you want to the reader to be able to do. Respond directly to questions without over-complicating what needs to be said.

Avoid Jargon

While we embrace freedom of expression, we also try to keep our communication understandable by all who might read what we write or hear what we say. When talking about something that you usually express with an acronym, even if you think it is or should be well known by most people, spell it out and put the anagram in parenthesis in the first mention. From then on, the use of the acronym is fine. For example:
The National Aeronautics and Space Administration (NASA) announced today that they will be sending a team to the moon for the first time in decades. The moon team at NASA couldn't be more excited about this adventure.

Don't Be Sorry

Don't be sorry for things that aren't your or our fault. It's often second nature for many people to begin a reply to questions or comments with the words "I'm sorry..." In some cases, that's fine since it can convey a sense of compassion or understanding. What can also happen, however, when using "I'm sorry..." is that a reply can come across as patronizing. Here are two examples of when to use and when not to use "I'm sorry..." in your communication.
When being sorry is appropriate

A customer writes: "I placed an order for two of your products and I only got one." In this case, we did something wrong, so it is appropriate to say "I'm sorry that you didn't get your second product. I'll make sure we get it to you right away."
When being sorry is not appropriate

A customer writes: "I can't get my password to work on your site. Could you tell me how to reset it?" In this case, we were not at fault *unless* the password issue was directly our fault, maybe if our server goes down, for example. Here is an example of what not to say. Even though unintentional, it can seem condescending:

"Hi, (Name), I'm sorry you're unable to figure out how to use your password. Try resetting it at (URL) and let me know if that helps."

The positive options here are:

"Hi, (Name), to reset your password, go to our password reset page (URL). If you have any further issues with it, please let me know."

or, if it is our doing,

"Hi, (Name), thank you for reaching out. We had an issue with our server earlier today which interrupted the site's functionality for a few minutes. I'm sorry for the inconvenience. I'd suggest resetting your password on our reset page (URL). If you need further assistance, please let me know."

Avoid Hype

Avoiding hype goes hand in hand with being authentic. Hype can make language sound like an advertisement. It can also make what may seem like a simple statement become egotistical and impossible to prove, even if it's made in jest or tongue-in-cheek. Here are examples:

Hype example

"We have the best product in the world!!!" seems like a harmless statement at first, but, unfortunately, there is no practical way to prove that we have the best product in the world even if we believe it's true. Adding extra exclamation points also makes it seem like it is over-the-top hype and isn't necessary.

Non-hype example

"Our customers tell us that we have the best product in the world!" (that is, if they are in fact telling us that) or "We think our product is the best in the world!" each communicates what we're trying to say in the first example, but both are factual statements. It's a subtle difference that can make all the difference.

Make sure Imagery and Content are Relevant to Each Other

A picture is worth a thousand words, but only if it's the correct picture. Make sure that any photos or images used are relevant to the message you're trying to convey.

Listen

Listening to the audience to keep tabs on who they are and what they want is critical to good communication. We do this on a broad scale with analytics and surveys, and on a smaller scale, we listen to what is being said to or asked of us. If what someone says or asks doesn't make sense to you, you ask for an explanation or clarification to make sure you are able to give them the information they need. It can help with post planning and topic choices in future individual posts or videos, or maybe a series on a topic that needs more attention.

People ask customer-service questions on all our social media platforms. We refer them directly to Globe Bank customer service so that their concerns are ticketed, and we can be sure that each issue is taken care of. The most efficient way to communicate this solution is to post the link to our customer service/contact us page on the web site.

Platforms We Use

The following are the external platforms that we currently focus on in our social media efforts. Just as we discuss the different types and purposes of content, the platform that a message is created for influences the kind of content that works best for that platform's members.

LinkedIn

How Globe Bank uses it

We use LinkedIn for a variety of purposes, including company visibility and promotions, sharing blog posts and press releases, recruiting new talent, and for software and skills training and development. We also use the platform to connect with others in our industry and announce events.

X

How Globe Bank uses it

Our X account is largely used by our PR team to post product and company announcements, as well as links to full stories on other platforms. We use X Cards on the platform to give shares of our posts added appeal and context. We use photos and videos on our cards, and when someone shares one of our posts, that respective card content is also shared along with the post. Using Cards significantly boosts our audience.

Facebook

How Globe Bank uses it

Globe Bank uses Facebook to post photos, slideshows, stories, videos, and links. The topics range from announcing new products, new ideas for use of our product, customer stories, company news, announcements of contests or raffles, events registration, and more.

Instagram

How Globe Bank uses it

Instagram is an ideal platform for our heavily visual content. We use it to post photos, slideshows, stories, videos, and links. The topics range from announcing new products, new ideas for use of our product, customer stories, company news, announcements of contests or raffles, and more.

YouTube

How Globe Bank uses it

As expected, we use YouTube as a platform to house many of our video assets that we've created about our business. These assets are then either embedded or linked to on other platforms when necessary.

Our blog

How Globe Bank uses it

Our blog is our centralized information hub that includes long-form stories, long-form information that is continued or expanded upon from social media platforms posts, and original copy about product, the company, customers, and so on. Our blog editorial calendar includes at least one post a day, and the posts are often linked to by our social media accounts.

Influencer Guidelines

The social media influencers we work with are held to the same high standards we hold ourselves to. While influencers are not employees of Globe Bank, we do hold contracts with them in which we agree to standards that we both adhere to. Successful influencers are highly visible brand ambassadors, and their actions and words reflect on our company just as ours can reflect on them—which is, of course, the point of having the relationship.
Our first rule of thumb is transparency. The disclosure of the relationship between an influencer and our company should always be clearly stated. For example, if we arrange with a blogger that creates their product using our product, it should be plainly stated at the top of an article or beginning of a video that they are compensated either monetarily or with product(s). As of this writing, Instagram requires that a disclosure is stated within the first three lines of a post. This kind of openness is becoming a regulatory requirement worldwide on multiple platforms.
Another top priority is authenticity. Whether we are writing about our product, or an influencer is doing so, what is said or written about our product must be based on objective use and opinion of the product. You are welcome to send a copy of our company writing guidelines to the influencers that you are involved with.
Unlike some companies who pay influencers to say good things about them, we don't (nor do we want to) tell an influencer what to say about any of our products, services, or our company. Since we strive to have transparent and regular communication with our influencers, we invite them to let us know what they don't like about a product and help us to make it better. This is more of an authentic storyline than having them simply review a product as good or bad.

Graphics and Image Guidelines

Using Images, Photos, and Videos

Just like in our use of words, we want our images, photos, and videos to reflect who we are in an accurate and authentic way. It's critical, too, that we use only those images, photos, and videos that we have express legal permission to use. We prefer to use original work rather than stock unless the stock image/video can communicate what we are trying to show and say better than an original photo or video might. Stock images may be purchased with permission from your supervisor. Remember that you always have access to our library of approved original and licensed images, photos, and videos for use on any of our social media platforms.
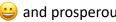
Emoji use

Can emojis be used, and if so when and why? We don't have a specific policy against using emojis, however, we do expect their use to be to make communication clear to all message readers.

Emojis shouldn't be used to replace words, and if used, should be used at the end of sentences or paragraphs. Our content looks better and allows anyone listening to the post using a screen reader or a phone app like VoiceOver to better comprehend the copy. Here's some sample copy with emojis inline as read by one of these apps:

> *Original:* We wish all our customers a happy and prosperous New Year!

> *With emojis:* We wish all our customers a happy 😄😄😄 and prosperous 🤑🤑🤑 New Year! 🎉

> *With screen-reader translation:* We wish all our customers a happy grinning face grinning face grinning face and prosperous excited face with money symbols for eyes and stuck-out tongue excited face with money symbols for eyes and stuck-out tongue excited face with money symbols for eyes and stuck-out tongue New Year! party popper

Product shots

We use both studio and candid shots of our products in posts. Basic guidelines for these images include:

It's always best if the product label or logo is easily recognizable as one of ours. The product doesn't have to look posed, but the label or logo should face the camera enough so that it is recognizable.

When taking shots of several different brands of product in a photograph, do not include their logo or other company information unless we specifically have a relationship with them and it is relevant to the story.

Stock photos

Use stock photos sparingly. When you choose a stock photo, be sure it is relevant to a post or story, and only use if there is no other resource for a supporting or editorial photo in our in-house approved library of photos and videos.

Workplace photos

Photos of our workspaces are fine if there are no photos of people that do not want their picture taken (see *Employee photos*). There should also be no photos of products that have yet to be created, announced, or are otherwise still under non-disclosure. There should not be close-up photos of anyone's desk space that allow any documents or screens to be readable. We take care when using these photos since our company reputation relies on it, and we also need to respect privacy and proprietary information.

Employee photos

When each employee is onboarded at Globe Bank, they are presented with a basic photo release form. It is not compulsory for them to have their photo taken for any reason except for their photo identification badge and human resources file.

That said, most Globe Bank employees have given us permission to use their photos in other respects—but you should still check with human resources or the individual before posting or publishing an employee photo.

If the intent is to use an employee photograph in a marketing or advertising campaign, we will want to proceed with an individually drafted contract for the use of their likeness as representative of our company and/or product.

Image Specifications

While each platform will automatically compensate for an image or video that is the wrong resolution or size, it is always best to conform to each individual platform's specifications. Please check with the creative department if you need assistance with another photo or video size.

Making Connections

One of the wondrous aspects of social media is that we can make connections with like-minded people and businesses all around the world with just a click or two. It would be great if we were friends with everyone else in the world, but from a practical point of view, we simply don't have a fraction of the time necessary to do so.

Following other accounts

Following people or businesses is the act of signing up to see what they have to say, without them necessarily following us back. It's a one-way relationship. For example, Instagram and X have followers—an account can connect with us without requiring us to connect back.
Think of the time

We are selective in our choices of whom to follow to save time and to use the time we must best serve our customers.
Being selective

We can't in any way imply that we endorse individuals or other companies unless, of course, we do. For example, we may (and should) follow all our influencers, but there is no valid reason to follow all our customers.

Accepting connection requests

Connecting is a two-way relationship, and businesses can have this two-way connection on Instagram and X. When we connect with another member of a social media platform, we are both able to see what the other says and does.
Choosing connections

Much like following—well, technically, exactly like following— it takes time to read and keep up with all the people and businesses whose information and actions get added to our feed. It's key to be strategic in who we connect with, since often this type of relationship offers both parties a more direct way to contact each other, and we must be prepared to have the capability to answer whatever inquiries come our way.

Cross-Posting

Cross-posting is common on social media and works if it is done right. While the general idea of cross-posting means to simply copy what is on one platform to another, we like to use the ability to cross-post in strategic and effective ways. This means that we keep each platform's purpose and limitations in mind before assuming a story or post can be repeated word-for-word on each one.

Here's an example of how cross posting works well:

Blog post

We publish a blog post discussing how our company is growing. We mention we are opening a new office in a different city, and that we are looking for prospective employees. The blog post includes an introductory video about this new-to-us city, as well as photos with captions of three current employees talking about how great it is to work for Globe Bank. There are links to job descriptions and how to apply. Let's next examine the potential cross-posts and their format.

YouTube

The video in the blog post is already hosted on YouTube and the video's description on YouTube includes a link to the blog post. We do this because most people do not spend time reading a long YouTube description and we want them to read the story to understand the context of the video.

Facebook and Instagram

Facebook and Instagram are similar in that they can utilize each of the media posted in the blog. The video is a higher resolution if posted with each platform's proprietary video processor—which is necessary unless we decide to share a link to the blog post on Facebook (sharing links on Instagram is not possible). The blog post can be copied and pasted into Facebook if it is not incredibly long.

X

On X, we would likely include a short post with a link to the blog.

LinkedIn

Since we use LinkedIn to recruit and manage applications, it will have a major part in this process. First, the blog post links to the Jobs area on our business page. If the post mentions specific job opportunities, the post can link directly to each job description.

LinkedIn allows its members and companies to publish articles, allowing a perfect opportunity to repost the blog post or a condensed version of the blog post on LinkedIn with direct links to the job descriptions or jobs area.

Hashtags

Hashtags are words or phrases that are used to label content in a way that makes it easier for people to follow their interests. A hashtag starts with the pound symbol (#) followed by the word or phrase, without any spaces between the pound symbol and the first word and between words. We use hashtags to categorize our online content, which subsequently increases customer engagement with us and with each other.

Hashtag use

We create hashtags with common words or phrases that represent the content that it's associated with. Rather than trying to be unique and make up new hashtags each time we post, we maintain consistency so that clicking on a hashtag will bring up a list of related topics. Some basic hashtags we've used include:
#CustomerFavorite
#FridayTrivia
#ClimateChange
#HappyMonday
#InTheNews
#WeAreHiring

About #CamelCase

You may have noticed that our sample hashtags have each word capitalized. This is an accessibility practice that helps people better discern each word from one another. This use of a capital letter visually can help anyone better understand multi-word hashtags. It's especially helpful when the hashtag is trying to be read by a screen reader, as well as making it potentially easier to understand for those people who may have dyslexia or a cognitive learning disorder.

Conversations and/or Responses to Posts and Private Messages

As mentioned in other areas of these guidelines, only people in our company that are authorized to engage in social media conversations and messages should be fielding this communication.

What if I'm not authorized to answer a specific question?

If someone reaches out to you and you're not an authorized party for the kind of answers they need, then you should reply to their inquiry withs "The [department name] department should be able to help you with this. The quickest way to reach them is to contact them directly at [phone] or [email]."

Fast-tracking inquiries to the correct parties

So, if you're not authorized to post, who do you forward inquiries and messages to? Here's a basic breakdown by topic and department.

Type of Inquiry	Department
Press inquiries	Public Relations
Companies or Individuals who want to review our products	Marketing
People requesting information about becoming brand ambassadors or influencers	Marketing
Complaints or reports about products	Customer Service
Praise about products	Customer Service, Marketing
Questions about how products work or should be used	Customer Service
Issues with our web site or social media accounts	Technical Support
Job inquiries	Human Resources

SEO

Search Engine Optimization (SEO) is a critical ingredient in our online marketing toolbox. While social media posts don't affect our ranking in search engines directly, the more a story or post is shared, and the more we are followed and liked, directly affects our visibility, marketing, and sales just as SEO does. This means it also ultimately affects our bottom line and our reputation.

Return on Investment (ROI)

What makes a good ROI? A simple way to demonstrate good versus bad ROI is using a gambling analogy. If you put 10 dollars in a slot machine and win 100 dollars, that is a great return on investment. If you put 100 dollars in a slot machine and win 10 dollars, that is a bad return on investment.

Thinking outside the money

Our returns aren't always in monetary form. In some cases, it might be that we spend time writing an intriguing article on the blog that includes a 10-percent-off coupon. We cross-post it on our social media accounts. The story reaches thousands of people who then share it with their friends, making the total reach nearly a million people. Some of those people haven't heard of Globe Bank or tried our product, so they choose to follow our account(s) to see what we're about. Another segment of those that see the story and coupon choose to act on the deal and click through to our online store. From there, some decide not to buy while others purchase our product.

Depending on perspective, all of this may be a good or not-so-good return on investment, depending on what is projected and expected for results. If we expect to make $100,000 in sales and the coupon only resulted in $5,000 in sales, then it could be perceived that the return on

investment isn't good. That perspective can change depending on how many hours/dollars were spent on the story—i.e., the writer's time, the editor's time, the marketing representative's time, maybe the cost of a stock photo or photographers time, the blog editor and social media editor's time, the analytics team's time, and the web team's time. It can be that expectations didn't meet the dollar amount, but at the same time, it happens to have resulted in several thousand more followers who may later purchase from us, and let their friends know about us and our products, resulting in a long-term ROI of $300,000.

Auditing our content

A common way to test the results of one kind of content versus another type of content is to conduct A/B tests on our social media accounts.

Let's look at an A/B test example on Facebook. Your goal is to find out what time of day is best to put up a post by posting it first at one time and posting it again at another. You can test photos by posting two different versions and measuring/comparing the engagement of each. Tests like these can compare times of days, days of the week, content of a photo, comparing a photo series to a video that shows the same content, and so on.

Our goal with this sample A/B test is to determine what variant of a post gets the most attention and engagement so we will know which format performs best with our followers. We consider 'attention and engagement' in this case to be number of views, number of clicks on the photo, and the number of clickthroughs to the site. They have the same photo, the same link, and the same call to action. There is one change in the copy: One is a statement, and one is a question.

	Variation 1: Let us know if you like sharing your favorite jellybeans!	Variation 2: Do you like sharing your favorite jellybeans?
Test Plan	First, publish the statement post for one hour and then hide the post.	Once variation 1 is hidden, publish the second variant with the question copy.
Data Collection	After the second variant has been posted for the same amount of time as the first variant, compare views, likes, shares, and clickthroughs of the two post variations using our analytics tool.	
Results	Compare number of views, number of clicks on the photo, and the number of clickthroughs to the site.	
Action	If Variation 1 gets the results wanted, then unhide it and hide Variation 2. Conduct another test with another post with these two variants to determine if this is a trend or a fluke.	If Variation 2 gets the results wanted, then keep it up. Conduct another test with another post with these two variants to determine if this is a trend or a fluke.

Follow-up	Record results in the social media marketing database. If the comparison between the two variants is extreme, with possible repeat tests, consider adding this to writers' guidelines.

Even though the difference between these two variants may not be immediately noticeable on a content scale, reactions to a statement vs a question can tell us several things, such as:

- If more people like variant two, it could be that readers prefer to be asked (Do you...?) about something rather than being told what to do (Let us know...!)
- If more people like variant one, it could be that our readers prefer active statements (Let us know...!) versus passive statements (Do you...?).
- If there is no notable contrast in the results, it could be that it doesn't matter if we use a question or statement.

In any case, it would be beneficial to try this test again. If results remain neutral, there's no reason to go ahead with any content guide changes. If results lean one way or another, then that should be noted as we move forward with new content.

Metrics

Metrics are measurements of quantifiable aspects of our social media efforts from which we want to produce certain results. This can be as simple as posting a photograph and counting its likes and shares. Usually, though, it's more complex than that, and our work must focus on each part of the workflow to best achieve the goal we want to reach in the end.

Defining success

Counting likes and shares are only two parts of many quantifiable results that we might want to know. Before we can consider any social media action, post, or campaign a success, we have to define what success means to us. To define success, we first must set realistic and beneficial goals. For example, are we trying to increase something? Prove something? Find out about what our customers want and need? Setting us up for success must also mean that our goal must have meaning—we can ask anyone who is wearing a red shirt to like our page, but what benefit is that to us?

Setting goals

Our goals, as mentioned, keep in mind what effect we want our actions on social media to produce for our business. The aspects of our business we want to impact include:

- the amount of traffic that comes from social media;
- measuring the share of voice (SOV), which is basically how we measure up to our competitors;
- the number and/or percentage of conversions, such as product sales, that originate from our social media posts;
- obtaining an impression of what our customers think of us and our product at any given time; and

- understanding how many people share information about us, give us good reviews on independent review sites, and recommend us to their friends and colleagues via social media or otherwise.

Setting up a strategy and objective

Once we decide the practical goal for our campaign, no matter what we choose from the previous list or as a portion of one of these goals must be supported by an overall strategy to get ourselves to that goal. If we want our goal to be met, the strategy, in essence, serves as the guidepost for what we want the goal to accomplish for the business. For example, a campaign's overall strategy might be to increase brand awareness among those people who haven't heard of us. This brings us to our objective—the "why" behind all the work we are about to do. Some of our objectives include:

- driving conversions to sales;
- letting customers know how much they mean to us;
- building a community;
- generating more demand for our product; and
- creating brand awareness for our company and product.

Key Performance Indicators (KPIs)

Let's look at just one of these aspects: we want to increase how many people click on a link to our site from a social media post, otherwise known as traffic or visitors to the site from another place (in this guidebook, of course, we are concentrating on our social media accounts as the 'other place'). We also want to measure how many people sign up for our weekly newsletter. A key performance indicator is the piece of this action that shows us whether there is an increase —and in this case, counting the link clicks to our URL and new signups for the newsletter. Note that we are not including data in this metric such as how much they buy once they click through to us, or if they decide to leave a review: those are two different KPIs that impact our business in a different way.

How do we get them to act?

If we continue to use our example KPI of measuring the number of clicks through to our site and signups for our newsletter, then we must also decipher how best to get them to perform these two actions. The most direct methodology we use is to promote the newsletter on social media with the incentive of receiving a one-use coupon toward the cost of our product if they sign up to receive the newsletter by clicking on the link and/or button in our post. Examples of previous incentive programs are free shipping promotions, and 'buy three get one free' discounts. We welcome new ideas for practical incentives to encourage our audience to act.

How to Engage an Audience

Having an audience is great, but what is even more valuable to us is our ability to engage with them and learn about their needs, wants, and interests. From there, we determine what—if anything—we can do to help them.

Our Metrics section discusses ways to numerically assess where our audience stands and how they act, and in engaging an audience directly, we get our data directly from them in their own words. We do this in short form ways (asking one yes-or-no question) or long-form (asking them to write with direct feedback or to complete a multi-question survey).

Asking questions

Social media is a great place to ask questions and get near-immediate results. One of the more direct way of getting a direct answer is to ask a direct question. Is this a surprise? If you answered that question, you've proven the point. All we need now is to know how to determine the best questions to ask.

Need-to-know

When we are trying to find out specific information, we ask simple questions that give us the results we need. For example, asking "Do you like strawberries?" can have the options of 'yes' and 'no' as its answers.

Keep in mind, though, that in this situation and many other cases there are potentially several additional potential answers, such as "I've never eaten a strawberry." Polls often include the option of is "Other" with the added possibility of divergence with the qualifier "If you answered 'other,' please let us know what you mean."

This leaves an open-ended possibility of a different answer from each person who responds, as far-reaching as "I don't know what a strawberry is." to "OMG I love strawberries, but I used to hate them because they reminded me of when I was a kid and got stung by a bunch of bees when I went strawberry picking with my aunt." As you can see, we open the door to an endless number of reasons a person's answer might not be a clear yes or no answer, so it's important to determine what level of information we need to know.

Creating polls

Most of the social media platforms we're on include an option to format a post as a poll for our followers to answer. The different platforms can have the same poll questions in most cases, but we take the platform and our audience profile into consideration so the poll reflects the platform's overall market. When we gather collect results from polls on different platforms, we look at them on a platform-by-platform basis as well as assessing data points overall.

LinkedIn Poll

Polls on LinkedIn are targeted toward our professional network that's well represented on the platform—vendors, distributors, potential employees, current employees, and customers. In the recent past, we have conducted polls on remote working, opinions on packaging design, and workplace safety.

Facebook, X, and Instagram Polls

Our tone is more lighthearted on Facebook, X, and Instagram because our audiences are most often on these platforms for entertainment, product news, coupon codes, and events rather than to conduct business with us. We tend to keep these polls simple and direct, and while some are for entertainment only (such as "Which Globe Bank product are you going to dress up as for Halloween?"), we also collect data from polls that are helpful for our business, i.e. "We're

thinking of changing the color of our label. Which of these examples do you like the best?" The question can in a lighter tone, and still have answers we can use to help move our company forward.

Community Forums and Groups

A group of like-minded individuals getting together and exchanging messages and discussions has long been a part of online activity for us and millions of others. Special interest groups of all kinds thrive online, and many personal and business relationships are enhanced with this ability to congregate informally and formally.

As a company, Globe Bank belongs to groups that we host and ones created by others, depending on the topic.

In our social media communities, we follow the same guidelines as we do for posting in general. We respect all members, we don't allow inappropriate posts or bullying, we take care to respond to all those who reach out to us on the platforms, and fast-track inquiries as necessary When taking part in others' communities while representing Globe Bank, we must remember just that: We are representing Globe Bank and must behave accordingly.

Setting up an Editorial Calendar

Setting up a Calendar

Setting up an editorial calendar creates a pliable system that allows us to plan and assign posts and stories and navigate cross-posts and analytics. It is the centralized organizational hub for all our social media content and includes cross-platform campaign and individual post information, assignments, due dates, and deadlines. We use tools that allow us to schedule and plan stories and articles in an efficient way on a timetable that makes sense in relation to all other posts and stories to bring together a cohesive presentation.

An initial, standard editorial schedule starts with the final publish date and goes backward. Let's assume it's a blog post we want to publish on December 13. On the most rudimentary level of planning, copy and images need to be sent to the blog editor one to two weeks prior to that date to allow time for corrections—that would be from November 29 to December 6. That means copy needs to be assigned written at least a week prior to the deadline, so at the very latest, November 22, depending on the length and type of blog article it will be.

Completing some stories may take a few days, others may depend on getting interviews and fact-checking statistics, for example, and could take a month or two (September 22, October 22). Either way, the schedule is changeable to compensate for what needs to be done at each stage.

Using this basic schedule construct, we create a dynamic system that works together to keep all our posts on schedule in relation to one another. This is especially key when we need to coordinate stories and posts with a marketing campaign or launch date for a product.

Each platform will have its own calendar that is interdependent of all other calendars. We do this, for example, because a post very rarely takes the same amount of time to write as a long-form blog post, and yet it will have the same or nearly the same publish date as a related blog post or product launch post on other platforms. Even though a post is usually shorter than

content on other platforms, it still needs to be assigned and managed to ensure its timely posting. We never want to have to rush any content to be published, no matter how brief. Besides using our editorial calendar to keep track of dates, we use it to track and notate progress and changes. At a glance, we can see who is writing what story and when, what their project load is, how they are progressing, how a set of content is moving forward, and where help is needed. We can see any glut in the schedule and move deadlines and launch dates if necessary or assign someone to assist those that are already working on content. The opposite is true, too, so it's optimal that we can see that there's not much going on in April or there is exponentially more content in being scheduled for July.

Our Social Media Marketing Mix

Using an editorial calendar gives us an overarching view of our current and planned content. Another use for this critical tool is to ensure we maintain a balance of content appropriate for each audience on each platform on a regular basis.

We split our content into two overarching categories: engagement and promotion. Each of our platforms have their own balance of content.

Platform	Engagement Percentage	Promotion Percentage
LinkedIn	35	65
Facebook	70	30
Instagram	80	20
X	60	40
YouTube	50	50
Blog	65	35

Within each area of content, there are subcategories that break down by percentage.

	Engagement Subcategories Percentage		
Platform	Instructional Content	Customer Profiles	Polls
LinkedIn	30	30	40
Facebook	20	50	30
Instagram	50	50	0
X	0	0	0
YouTube	70	30	0
Blog	40	40	20

	Promotion Subcategories Percentage		
Platform	New Product	Job Listings	General News

LinkedIn	30	40	30
Facebook	30	20	50
Instagram	30	5	55
X	30	30	40
YouTube	50	20	30
Blog	30	20	50

We stay agile so that these percentages can shift when they need to. Keep in mind that these percentages are what performs the best within each of our audiences in our most recent research, and that is why they guide our content balance.

Why Scheduling is Important

We need to be diligent about assignments, deadlines, and posting/publishing because every element of each post or story's workflow can affect every other element of that and all other posts and stories. An editorial calendar that is set up to reflect the roadmap of each story is not only easier to follow, but also to remain agile and to make changes as smoothly as possible if necessary.

If an unexpected change occurs that may delay or accelerate a post or story, a well-organized schedule will help to quickly, competently, and (hopefully) seamlessly allow for a change to occur with little or no negative consequences. Any changes that need to happen should be reported as soon as possible to the social media marketing team editor in charge of the platform on which your story/post is slotted for publishing.

Maintaining a Bank of Evergreen Content

Evergreen content is any content that doesn't depend on a specific date to be relevant and valuable to our followers/readers. Think of it like this: An article about using floppy disks isn't evergreen because these products no longer being used by most of the population. However, an article about organizing files for storage (no matter how it's stored) will be relevant for as long as there are files that need to be organized.

We try to maintain a content bank that would cover each of our platforms for 30 days. Our content bank should roughly match the categories mentioned in Our Social Media Marketing Mix with some exceptions:

- Stories about new products won't be 'new' in the evergreen library;
- A category of "news" contradicts the what's-happening-now connotation of news; and
- Job postings will not remain relevant over time (although "what it's like to work in our industry" could be relevant for quite a while).

Before using our evergreen content, we have some due diligence to check off our to-do list:

1. Check all links in the evergreen content to make sure they are valid;
2. Make sure the overall balance of content is what it should be;
3. Be sure it is listed in the social media editorial calendar like all other content; and

4. Validate that the content is still relevant before putting on the calendar.

Once used, the evergreen content should be timestamped with the day and time used, and it should be noted what platforms the content was posted on.

Writing and Assigning Evergreen Content

Evergreen content assignments are listed and tracked in the Bank area of the editorial calendar. Just like any other content we post, this content is given hard deadlines for each step of the process, except that when finished, they are stored and indexed in the Bank until a time when needed. Then the piece will be added to the calendar with a publish date by the social media editor.

Things we write about

It's impossible to guarantee that evergreen content will be evergreen forever, so we do have to keep regularly review the articles and content we've written and ones we write for future posting. While these stories may be more generic than timely posts, the same level of quality is expected. They can be directly related to our company or long-term issues that affect all of us. They shouldn't be boring, and they should still be entertaining or helpful (or both!). Here are some ideas for future Bank content:

- Posts about each of our company core values and why each one means so much to us.
- How weather and climate affect our product production and distribution.
- The importance of giving ourselves a break from work, no matter how much we love it.
- Historic moments in our company's history.

Scheduling Evergreen Content

We schedule our evergreen content to publish on weekends and holidays. Our analytics show that our evergreen library content gets an exceptional amount of shares on Saturday and Sunday, so this all works to our advantage—and why we make sure this 'filler' content is high-quality and of high value to our audience.

We also publish evergreen content on days when we don't have a specific topic to cover or news story to share. These are scheduled by the managing editor.

Platform-Specific Analytics

The key reason we use analytics on social media and on our site is to better serve our customers. Analytics on each platform give us a view into our followers' and customers' wants and preferences, their actions, likes, dislikes, activities, and more. We use this information to:

- consider new products;
- consider retiring other product;
- decide where we might consider more actively distributing our product;
- determine price points;
- mitigate risk;
- decide on sales and marketing campaigns;
- get to the root of customer issues and complaints; and
- make business growth and change decisions.

In other words, analytics is a huge asset in our business management, business growth, operations, sales, and marketing toolbox. It can affect our activities on the platform level as well as our entire business model. The following explains a bit about how analytics on each platform affects our business and our activity on each respective social media outlet.

LinkedIn

LinkedIn has several ways to measure the activity of followers on its platform, including visitor and follower demographics, and activity comparison statistics between our page and our competitors. It also measures the update quality, photos, and videos by seeing how and when our followers and others interact with our content. All of this information is key to understanding our audience and how to improve our relationship with them.
We are also able to track interaction with our Career area. This allows us to improve our career content to better attract new talent to the company.

Facebook and Instagram

Our Facebook and Instagram company accounts analytics—known as Insights—are both available through the Facebook Business Suites. With Insights, we can track both paid and organic reach on both platforms, view content reports that show individual post reach, likes, comments, and shares. If the content is boosted, Insights also shows us how many link clicks we receive and how much it costs us for each one.
Insights can also give us page and account follower stats, including their age, gender, and location.

X

X Analytics are available through three dashboards:
Post Activity

The Post Activity dashboard measures basic post engagement.
Followers

The Followers dashboard gives us insight into our follower demographics and interests.
X Cards

X Cards, which we use on the platform to make those posts that our followers share more visually appealing, helps to increases overall traffic to our site. This dashboard lets us see just how many clicks and reposts we're getting with this feature.

YouTube

YouTube has an extensive analytics dashboard for the channel overall and for each video. We can also track groups of videos, when we decide to create a series that should be watched together. All these stats are accessible via our YouTube Studio.

Our Blog

We have been publishing a blog ever since we started our company. As one of our key marketing channels, it has helped to give Globe Bank more visibility and subsequently more

revenue. Our blog is our core platform for long-form content that is shared or mentioned on our social media accounts, and they often depend on our blog content.

Why we blog

We publish our blog for several reasons:
- we can share news about Globe Bank;
- its content helps our SEO efforts and therefore helps us appear higher in searches;
- it brings people to our site;
- it helps build our company credibility;
- it is a great home for our company voice to be displayed;
- it is a permanent repository for ideas, history, and company news;
- it is a place in which we can curate evergreen content;
- it allows us to create long-form content that then helps us to turn our site traffic into sales leads; and
- it helps us to establish Globe Bank as an authority about our line of work and class of product.

Who oversees our blog?

Our blog is published and maintained by our team and others in the marketing department. The blog managing editor works with us to maintain a strategic editorial calendar, recruits blog writers from within Globe Bank to write about their specialty topics, assists those writers in composing their posts to the level necessary, and keeps things running on a timely manner. Our web development team takes care of the back end of our blog as needed. Our marketing team tracks traffic, clickthroughs, and other analytics, and with the managing editor, determines the editorial calendar and post topics. Globe Bank publishes both standalone blog posts, and series blog posts.

Who writes for our blog?

We're happy that several of our employees have embraced the role of blog contributor to the Globe Bank blog. Each blog contributor must have express permission from both their direct supervisor and department supervisor and will be vetted and nurtured by our marketing department. Employees who have been assigned a blog post should use company time to write and rewrite posts.

What we blog about

The Globe Bank blog includes several different kinds of posts. Some of these posts have time constraints, meaning they are relevant to current activities and topics. Other types of posts are capable of being banked, or stockpiled, for use at any time, and serve well as evergreen content. We maintain posts in our bank for use at any time on the blog.

Company news

It stands to reason that we would use our blog to share news about Globe Bank. This can be announcing a new product, introducing a new employee, or announcing an event.

Company stories

Company stories might include posts about how we were founded, company history and growth, and the evolution of our product.

Industry news

As part of a burgeoning industry, we share news that our readers may find interesting or helpful.

How-to articles

Sharing new and proven how-to articles ranks very highly with our readers. We often find that these are widely shared on social media by current and potential customers. If the product is still available, these stories can usually be banked and used as evergreen content.

Interviews

We have had success with the few interviews we've published, including those interviews with famous users of our products, as well as those influencers we've chosen to be brand ambassadors for our company.

Resources

We love to share information that we learn, so we often publish articles and lists about resources on various topics that we have found helpful. Any resource that we recommend must have been used by the writer or people in our company.

Behind the Scenes/Employee Stories

Our customers often ask us about our methods and our people, so we tell them. We publish behind-the-scenes stories about product development, events, and what a particular team does here at Globe Bank. We also profile employees who have given us permission to do so, discussing their current role, how they got here, and any hobbies or talents they excel at.

What we absolutely don't do in our blog posts

We hate clickbait. It serves its purpose for some companies, we suppose, but it is not at all who we are or how we want to be presented to the public. The best way to avoid any sort of long, drawn out article that doesn't really tell our readers anything is to refer to our writer's guidelines. We want to be direct and to the point when offering information, rather than dragging a reader through page after page of nonsense.

SEO and blog posts

Our blog posts are incredibly important in driving traffic to our site from search engines. Our marketing team does extensive keyword research based on the target audience for a post, and that research is pulled together in a fluid keyword guide document that data is added to on an as-needed basis. We use the keywords in non-blatant, strategic ways in our blog titles and body content. Whatever is tagged as the blog <TITLE>title</title> is vital in searches, so using a keyword there is ideal.

Keywords are our best SEO tool. Our goal is to always put our readers first, and that's why...

- keywords must absolutely be relevant to the article (otherwise it will be categorized incorrectly);
- keywords should not be used over and over in one post; and

- readability is more important that the use of keywords. Don't force them into content if it makes it more confusing or unreadable.

We take care to use appropriate metadata and image alt tags. This information is also important to SEO rankings. We also utilize care in creating URLs so that it can help search engines figure out what the content is related to.

We also only use a few topic tags for each blog post because if there are too many tags, it's more difficult for a search engine to classify a post. Besides, if you find that your post is needing more than three topic tags, it may be too wide ranging and can possibly use an edit and rewrite. Lastly, be sure to use links in each post that will send readers to other relevant stories in our blog.

Blog Scheduling

As mentioned in the [Editorial Calendar segment](#) of this guide, the blog is a key part of our social media marketing mix and is scheduled along with our other platforms when deciding what and when to publish.

The blog, however, includes content that works with or without our other platforms, and its publishing calendar is affected by the data we gather about the blog's readership. Besides the marketing mix, we coordinate certain content to be published on specific days and hours for best blog-content reach and our overall social media reach.

Our research shows that on any given day of the week, publishing between 8 and 10 a.m. gives us the most readership per post. This closely parallels our other social media platform results. We do publish at other times of the day, but this is the time frame we focus on.

Since most of our market is on the West coast of the United States, we plan and schedule posts to be released based on Pacific Daylight Time (GMT/UTC -7) and Pacific Standard Time (GMT/UTC -8).

Studies have shown that the best day to publish a blog post to get the most shares on social media is Sunday. We have found that our blog traffic is highest on Mondays and Tuesdays, and the day that gets the highest traffic and shares combined is Thursday.

Because of these stats, we schedule most of our posts to be published on Mondays, Tuesdays, and Thursdays. We schedule evergreen content to be published on Saturdays and Sundays.

If our goal is to attain comments or poll responses, we tend to get the most responses on Saturday mornings. We attribute this to people having the time to put thought into writing comments and/or respond to a poll that they don't have during the week.

Remaining agile about scheduling is critical. We continually test our blog to assess our traffic, shares, and engagement, and tweak our blog schedule as necessary.

Setting up and Running a Campaign

We often create and post content under the construct of a campaign. A campaign is creating a plan to attain a goal by creating symbiotic content to help drive awareness and sales. We tend to use both marketing and advertising in campaigns to assure that our message is heard and acted upon.

Like our Metrics guidelines, we have several criteria we decide on before delving into a campaign:

Defining success and setting goals

We must decide what success means to us before starting out on a campaign. Let's assume a particular campaign is to create awareness and sales for a new product. What do we consider 'successful awareness'? Let's say that for this campaign, we want to grow our social media audience by 10,000 people. The other part of our success is defined by meeting a certain number of sales. We set our goal on selling 5,000 products.

Setting up a strategy

Once we decide the practical goal for our campaign, we figure out how to get there. To grow awareness and covert awareness to sales for this product campaign, we determine:
- what platforms to post on;
- where to purchase and place ads;
- the timing of each post and ad; and
- when the campaign is over.

Taking action

When our strategy is set, it's time to act. Refer to our guidelines for setting up an editorial calendar—setting up a campaign calendar is quite similar. Each platform we choose to use has copy and/or image needs. We've determined a deadline and plan each step to work in a timely way with the previous and next steps.
Since we've determined what platforms we're using, and that we're using ads and copy, the editor and campaign calendar must be in sync. Our campaign coordinator works with the social media editor to set this schedule up for success. We want both editorial and ad content to work with each other rather than compete.

Measuring success

Once a campaign is over, we want details on the two goals we set earlier to see if we've reached the success data points that we planned:
1. How many people did we add to our audience? and
2. How many sales did we get directly associated with the campaign?

A successful campaign meets or exceeds the goals we set.

In Conclusion

Every part of these social media guidelines is to make our team's work easier, more productive, more consistent, and more successful. If you have any questions at all, or have comments about any of the topics here, please reach out to us at any time.