

Playbook & Toolkit



Follow this simple step-by-step playbook to develop a social media strategy plan that supports your company's goals & objectives.

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SOCIAL MEDIA MARKETING

Framework







Click the buttons below to access all related training, tools, templates, and other resources.



SOCIAL MEDIA MARKETING Maturity Model





	_	STAGE 2 - Progressive	STAGE 3 - Mature	STAGE 4 - World-Class	
Senior Management Commitment STAGE 1 - Undefined Skeptical of Social Media; Is willing to fund isolated projects and/or test pilot		Views Social Media as a new marketing channel; Allocates budget & staff resources	Long-term commitment; Is a willing participant; Adds resources for growth	Views Social Media as a strategic function; Fully funds efforts; Aligns organization for social success	
Social Media Knowledge	Limited knowledge of Social Media channels	Solid understanding of Social Media use	Leverages peer groups; Active community management	Active thought leaders; Social influencers	
Customer Engagement	Company profile on Social Media sites; Posting is sporadic and ad hoc; Lack of audience awareness; One-way dialog	Growing subscriber lists; Customer & audience awareness; Mostly one-way dialog; Sporadic customer participation	Consistent customer engagement; Reactive social listening; True dialog; Recognition of preferred audience	Proactive social listening; True dialog with ideal audience; Process loop for customer feedback to impact company	
Competitive Insight	No or little competitive tracking exists	Audit top competitors online strategy and know their Social Media strategy	Regularly track competitors; Monitors activity daily	Analyzes social activity of competitors and provide insights to stakeholders	

SOCIAL MEDIA MARKETING Maturity Model





Social Business	STAGE 1 - Undefined	STAGE 2 - Progressive	STAGE 3 - Mature	STAGE 4 - World-Class
Budget & Staff	No budget exists; Spending & staffing is ad hoc	Budget allocated; Defined roles & responsibilities for Social Media	Budget with business case to justify spend; Dedicated internal point person for Social Media	Budget connect to social goals; Organization aligned for maximum social impact
Plan & Channel Selection	No coordinated effort	Defined Social Media Channel Map and posting strategy	Defined strategy with some objectives, targets, initiatives and measures	Strategy implemented; Integrated solutions and tools; Getting measurable results
Metrics & Measurement	Size of population (i.e. Twitter followers, Facebook likes, # of LinkedIn connections, etc.)	Social Media dashboard for brand awareness, channel activity, social reach and reputation management	Dashboard results are tracked and communicated	Dashboard results deliver verifiable return and drive new initiatives & policies



Want to rate your organization's Social Media Marketing maturity with an interactive tool? Download our **Social Media Maturity Assessment** and get started today!



VIEW RESOURCE 🗷

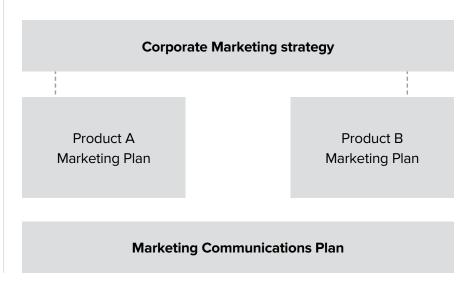
	1	2	3	4	5	6
	Identify Objectives	Establish Governance	Analyze Stakeholders	Select Technology	Complete Your Plan	Launch Your Program
Introduction						

What Is the Purpose of This Playbook?

To help you develop a **Content Marketing Program** that:

Is aligned with corporate values and vision

- Provides a solid foundation for content marketing
- Supports Corporate Marketing strategy, Product Marketing plans, and Marketing Communications plan



How to Use This Consulting Playbook

This playbook consists of six stages, each with a description, steps, and action items. Action items include using our premium tools and templates. Our intention with this playbook is to help you:



Understand social media marketing and identify opportunities



Evaluate your content marketing program by building content and organizing distribution channels



Plan the results of your program and foster an environment of continuous improvement





1 2 3 4 5 6

Identify Objectives Complete Your Plan Program

Introduction

What Is Social Media Marketing?

Social media marketing refers to the process of gaining website traffic or attention through social media sites.

Social media programs usually center on efforts to create content that attracts attention and encourages readers to share it with their social networks.

A corporate message spreads from user to user and presumably resonates because it appears to come from a trusted, third-party source, as opposed to the brand or company itself. Hence, this form of marketing is driven by word-of-mouth, meaning it primarily results in earned media rather than paid media.

Among other reasons, social media marketing is popular because it's inexpensive, easily accessible, fosters brand awareness and can help improve customer service.

What Is the Social Media Strategy Workbook?

As you proceed through this playbook, you will come across **Action Items** and **Key Deliverables.** Generally speaking, both of these items involve using a tool or template from the Demand Metric Toolkit to conduct an evaluation, complete an exercise or to map a process.

The Key Deliverable of this playbook is the **Social Media Strategy Workbook** which will be used to outline, summarize and to communicate your social media strategy plan using the following tabs:

- Project Purpose
- Social Media Objectives
- Channel Scorecard

Social Media Strategy Workbook







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Introduction

Scope of the Social Media Marketing Plan

Content Marketing is only one component of Online Marketing and should be considered part of a larger, integrated Marketing plan. This playbook will help you develop a content marketing strategy that is aligned with corporate strategy, marketing strategy, marketing communications, and product marketing.

If you haven't already discovered our other playbooks, be sure to review them before moving forward.

Product Marketing Plans



Marketing Strategy Plan



Marketing Communications Plan







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Objectives	Governance	Stakeholders	Technology	Plan	Program	

Introduction

Outputs from This Playbook







STAGE 1 Identify Objectives

Instead of diving "head-first" into social media marketing, you will need to conduct the following activities before moving forward with your program:



STEP 1: Establish a Benchmark

STEP 2: Review Strategic Marketing Objectives

STEP 3: Understand & Document the Program's Purpose

STEP 4: Outline Your Social Media Objectives



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STEP 1

Establish a Benchmark



Action Item

Use the <u>Social Media Maturity Assessment</u> to measure your organization's ability to implement a Social Media Program.



Areas of evaluation include:

- Senior Management Commitment
- Social Media Knowledge
- Customer Engagement
- Governance & Measurement
- Staff & Resources
- Plan & Channel Selection
- Process Documentation
- Competitive Insight

STEP 2

Review Strategic Marketing Objectives



Action Item

If you have not developed a Marketing Strategy, do that before attempting to create your Social Media Plan. Use the **Marketing Strategy Playbook** to do this.



Regardless of how your marketing strategy was developed, refer to it to get the context for developing your Social Media plan:

- What products or initiatives will your Social Media plan support?
- What core values or strategic objectives should influence the development and content of the Social Media plan?
- What core competencies can you exploit or showcase through this Social Media?





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STEP 3

Understand Your Program's Purpose

Objectives



Action Item

Use the <u>Social Media Opportunity Assessment</u> to identify achievable goals in three social media target areas: sales, marketing, and customer service.



This tool will evaluate the potential benefits that your organization can expect from a social media implementation based on the answers that you give using the drop-down lists provided.



Key Deliverable – copy the results of the Social Media Opportunity Assessment and paste them in the first tab of the **Social Media Strategy Workbook** ("Project Purpose" tab).

STEP 4

Outline Your Social Media Objectives



Action Item

Open the <u>Social Media Strategy Workbook</u> to the "Social Media Objectives" tab and document your high-level social media objectives, programs, KPIs and target timeframes.



Use the scorecard to document your high-level business objectives for the social media program. Examples include:

- Establish governance
- Process (maintaining & updating sites)
- Allocate resources (new hires, training, etc.)
- Integrate technology





STAGE 2

Establish Governance

In the case of social media, having a solid governance structure will enable your company to improve its ability to make decisions that maximize value.

Before diving into social media marketing it's important that you:



STEP 1: Form a Governance Committee

STEP 2: Create Guidelines & Customize Your Policy



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STEP 1

Form a Governance Committee



Use the <u>Social Marketing Governance Document</u>

<u>Template</u> to document a framework that can be used to govern your social marketing program.



At the highest level, this Microsoft Word document is intended to address the following areas:

- Governance Goals
- Training
- Governance Structure
- Funding Model
- Governance Process
- Metrics
- Roles & Responsibilities
- Continuous Improvement
- Implementation Timeline

STEP 2

Create Guidelines & Customize Your Policy



Use our <u>Social Media Policy & Guidelines</u> to create reasonable guidelines for online behavior by employees and contractors who use social media on behalf of your company.



Be sure to include input from your employees when writing this document and to obtain feedback before a corporate-wide launch.

The effective use of social media can be extremely beneficial to any organization. Therefore, this document should empower your employees to use these emerging technologies responsibly.





STAGE 3 Analyze Stakeholders

Stage 3 is diagnostic and involves detailed research and analysis, during which you will consider your company, your brand, your customers, your industry, and your competitors.



STEP 1: Understand How Social Media Is Being Used

STEP 2: Analyze the Competition

STEP 3: Audit your Capabilities



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STEP 1

Introduction

Understand How Social Media Is Being Used



Action Item

Use our <u>Social Media Usage Survey</u> to get a better understanding of your employee, customer, and target audience behaviors based on habits, interests, level of participation, and current involvement across a variety of social media channels.



Having a deep understanding of your customers and prospects is important for growing your business because you'll be able to:

- Focus on what matters to them
- Understand their communication style
- Find out what makes them tick
- Position yourself as a thought leader

STEP 2

Analyze the Competition



Action Item

4

Select

Technology

Use our <u>Social Media Competitor Tracking Template</u> to monitor and compare key metrics of your competitors' social media efforts.



Select the channels you would like to track and record areas such as monthly blog postings, sentiment, average number of comments, etc. This Microsoft Excel template includes tabs for each channel such as Facebook, LinkedIn, Twitter, Blogs, and Other.





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STEP 3

Audit your Capabilities



Action Item

Use our **Digital Marketing Roles Matrix** to help you organize your Digital Marketing efforts.



This roles matrix was designed with Digital Marketing best practices in mind. It should be used to audit your current capabilities and ultimately help you document an action plan for each of the following stakeholders: Senior Management, Strategic Communications, Demand Generation, Content Marketing, Community & Social Media, Public Relations, Product Marketing, and Customer Experience.







Select Technology

To this point, you've done in-depth research and analysis in preparation for setting objectives and developing your Social Marketing Strategy. In this Stage, you'll determine the best channels and the right technology for your business by using the templates provided and the insights that you've gained from the first three stages of this playbook

In this Stage, you will use three types of technology to evaluate social media channels, social CRM and social media monitoring (aka. social listening).



STEP 1: Social Media Channels

STEP 2: Map your Social Media Channels

STEP 3: Does Your CRM Have Social Integration?

STEP 4: Can Your Marketing System Integrate?

STEP 5: Read our Solution Study

STEP 6: What Should You Be Listening for?

STEP 7: What Vendors Should You Engage?

STEP 8: What Experiences Should You Look for?

STEP 9: Which Analysis Should You Make?



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STEP 1

Select Social Media Channels



Action Item

Use our <u>Social Media Channel Selection Tool</u> to evaluate your Social Media channels based on their strategic fit, impact, and feasibility.



Sample ranking criteria can include:

- Alignment with Company Goals
- Market Positioning
- Industry

- Cost/Benefit
- Customer
- Technical Risk

Expected Reach



Helpful Hint – Use our **Top Social Media Sites Database** to obtain a brief description and understanding of when to use over 70 of the top social media sites available today.

STEP 2

Map your Social Media Channels



Action Item

Use our <u>Social Media Channel Map</u> to outline your Social Media strategy by channel.



Map your strategy by grouping selected channels into bubbles and create a description of how you plan on attacking each channel by setting goals, selecting a project sponsor, and highlighting key performance indicators (KPIs).



Helpful Hint – Open the <u>Social Media Strategy Workbook</u> to the "Channel Scorecard" tab and document your programs, KPIs, and target timeframes for each channel you have selected.





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STEP 3

Does Your CRM Have Social Integration?

Objectives



Action Item

CRM vendors are rapidly integrating social media with their solutions as they realize its potential value. Visit your CRM vendor's website or **schedule a call with an analyst** to find out whether your CRM Suite has the ability to integrate native and/or 3rd-party social media functionality.









Some vendors (such as Oracle) natively support social channels, while others (such as Microsoft Dynamics CRM and SugarCRM) are dependent on third-party tools (such as InsideView) to enable social media functionality.

STEP 4

Can Your Marketing System Integrate?



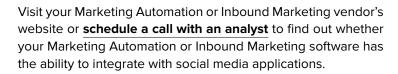
Action Item

If you are currently using a Marketing Automation system or Inbound Marketing software, vendors are making it easy to share and syndicate your content across various social networks, track the inbound traffic, and measure the results of your campaigns.













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STEP 5

Read our Solution Study



Action Item

Our **Social Media Marketing Solution Study** highlights insights, the landscape, and the vendors associated with the Social Media Marketing space.



The Social Media environment is vast, complex and constantly changing. It takes dedication, time and effort just to stay current with the changes, let alone evaluate and implement the best products/services for your organization.

Our look at Social Media Marketing strategies, processes and implementations focuses on four, key platforms: Social Listening, Social Engagement, Social Experience and Social Analytics. Our analysis also includes detailed descriptions of the major Social Networks in play right now.

STEP 6

What Should You Be Listening for?



Action Item

Use our **Social Listening Vendor Evaluation** to compare Social Listening vendor solutions based on your requirements.



Social Listening platforms monitor conversations across Social Networks for mentions of a company/brand to collect opinions of and experiences with that company, brand, or product.

They also provide data to the company for social response, sales action, or customer service. Most of these platforms offer analytics to provide customer profile information rather than just data streams.



Helpful Hint – Use our **Social Listening System RFP Template** to help you design a Request for Proposal (RFP).





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STEP 7

What Vendors Should You Engage?



Action Item

Use our <u>Social Engagement Vendor Evaluation</u> to compare Social Engagement vendor solutions based on your requirements.



Social Engagement Platforms focus on apps that deepen the engagement between the company and the customer.

While most of these platforms offer a monitoring component, they provide a deeper level of engagement via apps for increasing ease and speed of social sharing, developing online communities, content creation & publishing, and/or gamification.



Helpful Hint – Use our **Social Engagement System RFP Template** to help you design a Request for Proposal (RFP).

STEP 8

What Experiences Should You Look for?



Action Item

Use our <u>Social Experience Vendor Evaluation</u> to compare Social Experience vendor solutions based on your requirements.



Social Experience platforms usually include components of both monitoring and engagement platforms; however, they go a step further with functionality that changes the way the customer interacts with a company.

Common apps and features of Social Experience platforms are customer journey mapping, personalized content publishing, story creation, personalized gamification apps, and apps for facilitating innovation and new product development.



Helpful Hint – Use our **Social Experience System RFP Template** to help you design a Request for Proposal (RFP).





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STEP 9

Which Analysis Should You Make?



Action Item

Use our <u>Social Analytics Vendor Evaluation</u> to compare Social Analytics vendor solutions based on your requirements.



Social Analytics Platforms focus on the collection, measurement, and benchmarking of social activity, behavior, opinion, and emotion across Social Networks and media types (owned, earned, & paid social media).

These profiles include visualization dashboards for understanding and applying data for customer engagement, sales, customer service, competitive analysis, and social marketing ROI.



Helpful Hint – Use our **Social Analytics System RFP Template** to help you design a Request for Proposal (RFP).







STAGE 5 Complete Your Plan

In Stage 5, you will complete your Social Marketing Strategy Plan by outlining the following:



STEP 1: Build Your Social Marketing Budget

STEP 2: Identify Risks & Develop Contingency Plans

STEP 3: Build Your Social Marketing Team

STEP 4: Document Your Social Marketing Workflow

STEP 5: Provide Social Media Training



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STEP 1

Build Your Social Marketing Budget



Use our **Social Media Marketing Budget Template** to set and track your budget and then view 3 charts (actual vs. budget, spend summary, category breakdown).



Your social media marketing budget will include:

- Content Creation
- Graphic Design
- Technology
- Staff
- Advertising

- Promotions
- Agency/Consulting Fees
- Microsites
- Video Creation
- Etc.

STEP 2

Identify Risks & Develop Contingency Plans



Action Item

Use our <u>Social Media Risk Assessment</u> to document risks, assess their impact and probability, and develop risk-mitigation plans.



After you have conducted your social media risk assessment, the findings, assessment, and recommendations should be presented to management.

It is important to prioritize them, create a budget, and have a tactical and strategic plan for implementing the recommendations.





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STEP 3

Build Your Social Marketing Team



Action Item

The structure of your Social Marketing Team will depend on your social media objectives and the channels that you have selected. Use our **Social Media Governance Document** to outline roles and responsibilities. It's also a good idea to add new team members into your **Organizational Chart.**



A few popular positions include:

- Social Media Manager
- Social Media Monitor
- Social Media Analyst
- Social Media Strategist

STEP 4

Document Your Social Marketing Workflow



Action Item

Understand and document how social interactions will be handled. It's important to create a process diagram so that all stakeholders can understand their level of involvement.

A few common models/options are:

- Centralized a single workspace is owned and operated by a single business unit or department (e.g., Marketing owned and managed social media marketing platform)
- Distributed multiple workspaces are deployed to several groups (e.g., multiple departments or brand portfolios) in the organization
- Agency a contracted third-party to provide social media management and analytics





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STEP 5

Provide Social Media Training



Social media training is important at the beginning of your program but should be conducted on an ongoing basis. Please review and edit the sample training program below:

Training Stage	Length	Attendees	Delivery
Initial Training	60-90 minutes	10-15, 1:1 ratio	Structured, in-person or via web-conference
Community Development	Ongoing, Online	Unlimited	Online Discussion and/or Open Forum
Renewal Training & New Processes	15-30 minutes	15-20	Informal, in-person or via web-conference





STAGE 6 Launch Your Program

With the major elements of your Social Marketing Strategy in place as a result of Stages 1-5, you will finish this process by considering the budget and how you will measure your strategy's results.

In this Stage, you will:



STEP 1: Create a Social Media Program Checklist

STEP 2: Create a Social Marketing Calendar

STEP 3: Set Up Selected Social Media Channels

STEP 4: Consider Influencer Marketing

STEP 5: Monitor & Measure Your Program



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STEP 1

Create a Social Media Program Checklist



Action Item

Use our <u>Social Media Implementation Checklist</u> to organize and assign tasks when implementing a social media program.



Our Social Media Implementation Checklist will provide you with a starting point to help you manage your social media program more effectively. However, you are encouraged to update the checklist according to your needs.

STEP 2

Create a Social Marketing Calendar



Action Item

Use our <u>Social Media Marketing Calendar</u> to organize and communicate all of your social media marketing activities. This tool is perfect for marketers who work with large teams and who need to allocate ownership to various initiatives.



Depending on your business, the communications you could prepare may use the following channels:

Facebook

LinkedIn

Twitter

Blogs

YouTube

Vimeo

Pinterest

Etc.





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STEP 3

Set Up Selected Social Media Channels



Action Item

Depending on the channels that you selected, use our social media implementation checklists to get your program off the ground:



Demand Metric has the following checklists available:

- Facebook Page Checklist
- Twitter for Business Checklist
- LinkedIn Group Checklist
- Pinterest Implementation Checklist

STEP 4

Consider Influencer Marketing



Action Item

Review our <u>Influencer Marketing Playbook and Toolkit</u> to create a streamlined approach to influencer marketing campaign execution and measurement.



Our Influencer Marketing Playbook is a step-by-step methodology that helps you build a strategic process using "Best Practices" and other Demand Metric tools & templates.

Stages include:

- Learn
- Plan
- Enable
- Execute
- Measure





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STEP 5

Monitor & Measure Your Program



Use our <u>Social Media Metrics Dashboard</u> to define, track, and report on your key Social Media program metrics and KPIs. All the metrics can be easily customized to suit your organization's needs.



A few possible KPIs include:

- Alignment with Company Goals
- Market Positioning
- Industry
- Expected Reach

- Cost/Benefit
- Customer
- Technical Risk
- Resources







Conclusion





At the end of any business process, it's always a good idea to review it and identify areas for improvement.



Demand Metric has the tools and expertise to help you build an effective Social Media Marketing Plan

- Creating or auditing your social media marketing plans
- Assisting with using any of the tools referenced in this playbook
- Providing hands-on marketing assistance to accelerate achieving your marketing department's goals.

About ANA



The **ANA** (Association of National Advertisers) makes a difference for individuals, brands, and the industry by driving growth, advancing the interests of marketers and promoting and protecting the well-being of the marketing community.

Founded in 1910, the ANA provides leadership that advances marketing excellence and shapes the future of the industry. The ANA's membership includes more than 1,000 companies with 15,000 brands that collectively spend or support more than \$400 billion in marketing and advertising annually. The membership is comprised of more than 750 client-side marketers and 300 associate members, which include leading agencies, law firms, suppliers, consultants, and vendors.

Further enriching the ecosystem is the work of the nonprofit ANA Educational Foundation (AEF), which has the mission of enhancing the understanding of advertising and marketing within the academic and marketing communities.

About Demand Metric



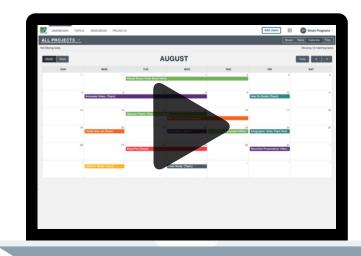
Demand Metric helps Marketing teams get stuff done with practical tools, training, and a simple, modern platform for managing work.

Our analysts identify best practices from fast-growing companies and build Playbooks & Toolkits, Guides & Reports, Training Courses, and Project Templates to help you optimize your processes, add structure to your department, and get your team punching above their weight class.

Manage your work visually with our easy-to-use platform, built for small marketing teams by design. See what your team is working on at a glance so you can spend less time managing projects and more time knocking stuff off your list.

Through strategic partnerships with the AMA, ANA, and AIPMM, our 1,000+ time-saving tools & resources have become the industry standard. Don't start from scratch!

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