



Social Studio

Salesforce Marketing Cloud Developers Group

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Statement under the Private Securities Litigation Reform Act of 1995



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Introduction

Tamara Klink - Senior Campaign Manager / SFMC Consultant / Social Specialist



BACKGROUND

- 2+ years SFMC experience
- Specialise in strategically implementing Social Studio in enterprise sized clients.
- Purpose in life: inspire females to move into the tech industry and educate how to balance work/life
- Certified SFMC Email Specialist
- Certified SFMC Social Specialist
- Salesforce Ranger



@tamarajohanna_

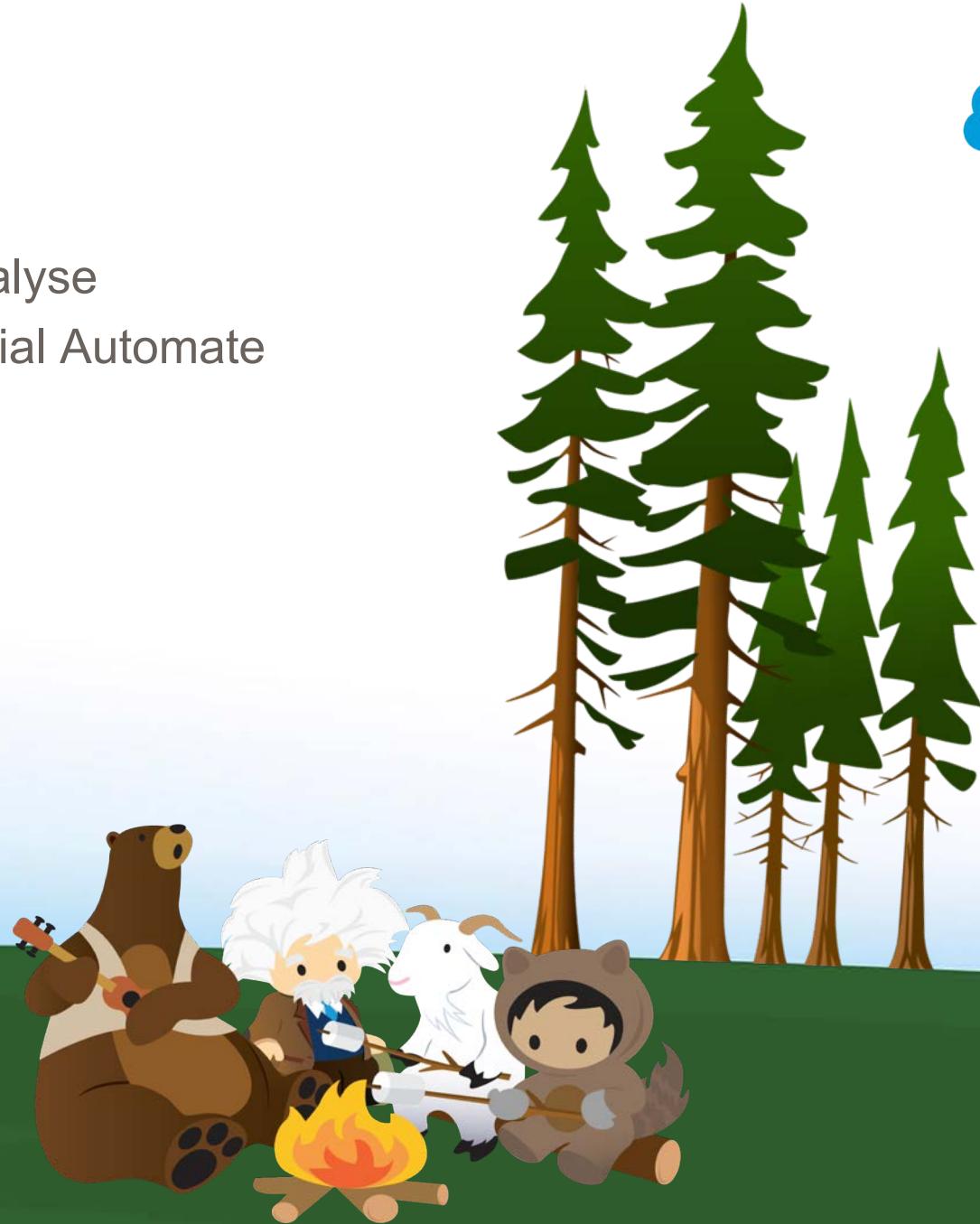


In/tamarajohanna

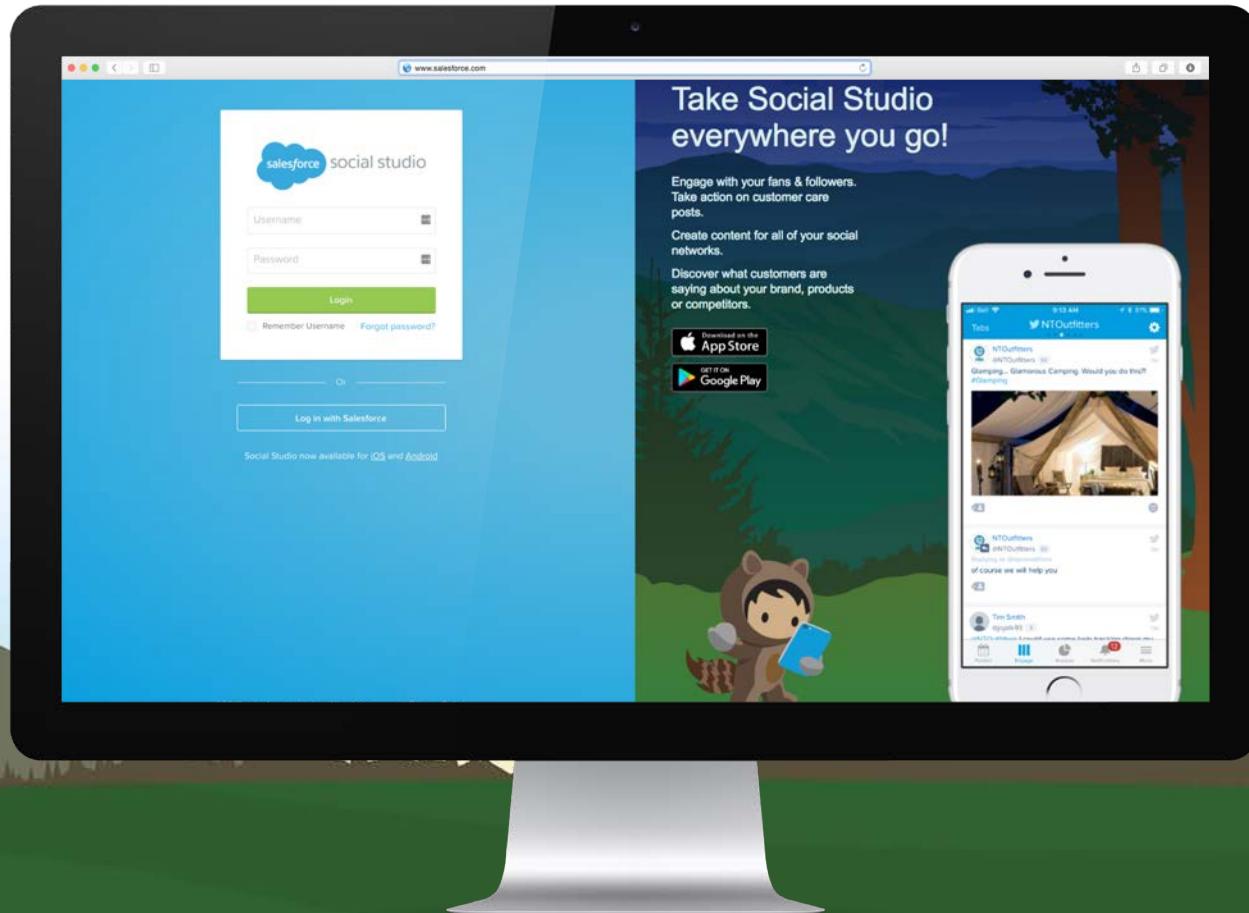


Agenda

- High-level Demo Publish, Engage and Analyse
- Difference between Social Studio and Social Automate
- Exam Hints



Organisational Settings



Platform



Publish

Engage

Analyse

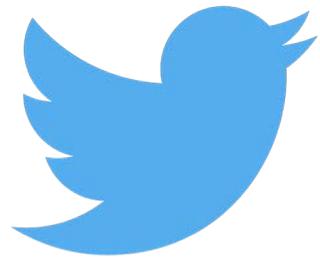
Participate and
manage conversations

Start conversations

Find and understand
conversations



Social Accounts



Social Studio Structure



Tenant

Workspace

Social Account

Salesforce

APAC

EMEA

AMER



Use Case



I have just hired an intern who is responsible for scheduling posts.

I do not want this intern to be able to respond to posts.



User Roles



Contain permissions for the management of resources within a Social Studio tenant

Cody

Admin Only User



Einstein

Super User



Astro

Full User



Appy

Basic User



Workspace settings



Define the actions a user can take on social accounts within a workspace

Einstein

Workspace Admin

Astro

Contributor

Appy

Limited



Best Practice



- Ensure every employee has their own login (if required)
- Ensure permissions are customised to each individual employee
- Disable former employees immediately
- Ensure language and time zone settings are accurate
- Leave test accounts in a test workspace - don't mix them with active workspaces
- You must have admin rights within a Social Account (e.g. Facebook) to be able to link with Social Studio)
- One workspace per region





Workspace Tab
Performance Tab
User Settings
Admin



Publish



A cartoon illustration of Albert Einstein with wild white hair and a beard, wearing a brown coat over a blue shirt. He is looking down at a computer monitor. The monitor displays the Salesforce Social Studio interface. The interface shows a calendar view for the week of May 6-12, 2018. On the left, there is a sidebar with sections for "SOCIAL ACCOUNTS", "STATUS", and "LABEL". The main area shows scheduled posts for various social media accounts, including Northern Trail Outfitters and NTOOutfitters, with preview snippets like "Northern Trail Outfitters 10:00 AM Let's go take a look!" and "NTOOutfitters 10:00 AM Let's go take a look!". The background of the image features a stylized landscape with green hills, yellow autumn trees, and a blue sky.

Use Case



Scheduling posts takes time, and I simply don't have the resources to schedule posts to all of our social accounts.

My employees often forget to apply the correct Google Analytics metrics, which is creating additional work for my analysts.



Publish Macros

- Save sets of social accounts for ongoing publishing
- Save specific targeting audiences that you want to reach consistently
- Reduce categorisation errors and improve data quality by reusing a specific set of labels
- Improve overall reporting and accuracy with a cleaner set of campaign tracking data
- Apply during the post creation process

The image displays two screenshots of the Salesforce interface. The left screenshot shows the 'View Publish Macro' screen for a macro named 'Facebook Gating - United States + English'. It details the macro's purpose ('Gate post to United States + English'), its components ('Facebook Gating (1)'), and its settings ('Country: United States'). The right screenshot shows the 'Add Attributes' screen, which lists various targeting options: Labels, Social Accounts, LinkedIn Targeting (selected), Web Analytics Profile, and YouTube Playlists. Both screens include standard UI elements like search bars, buttons for adding or canceling changes, and a delete macro option.





Calendar
Notes
How to create a post
Post inspector
Shared content
Publish Macros

Use Case



There has been times where a post has been published on Facebook that did not have my approval. This post went viral and was very damaging to our brand identity.



Approvals

- Approvals allow you to send posts through an approval process you've defined. This ensures content will not be published until approved.
- Approval rules can be based on:
 - Author
 - Social account
 - Facebook Gating Country
 - Facebook Gating Language
 - Label



Appy:
Social Media Coordinator,
Facebook:
Content creator, Publish
Expert,
Relationship Builder
(Contributor)



Why Use Approval Rules?



Ensure risk of personal posts are not published on business accounts

1

Decrease chances of human error

2

Consistent brand voice/tone and syntax

3



Example



Conditions: What criteria must be met to trigger this rule?

1	Submitter	is	Appy
---	-----------	----	------

AND

2	Social Account	is	salesforceapac
---	----------------	----	----------------

AND

3	Gating Country	Contains	Australia
---	----------------	----------	-----------

Approvers: Who needs to approve this rule?

Approver	Cody
----------	------



Best Practice



- Start with simple approval rules then gradually use advanced tools once you understand how the tool works
 - E.g. Every Facebook post must be approved by Einstein and Appy
- Ensure there are always two approvers (allows one approver to go on holidays/sick leave)



Engage

A tablet device displays the Salesforce Social Studio interface. The main screen shows a feed of social media posts from various sources, including National Parks, Fulton Jones, Teignbridge Business, Devon Glamping, ArcGMC, TravelGround, and Sankar Chanda. One post by Teignbridge Business discusses glamping options in Devon. Another post by ArcGMC mentions camping strategies for families. A third post by TravelGround discusses a new campsite in Mpumalanga. A fourth post by Sankar Chanda talks about the need for regular school interaction programs. On the right side of the tablet, an "Inspect Post" modal is open for a specific post from "western australia WA Budget 2018". The modal shows detailed information about the post, including its source URL (www.westernaustraliabudget2018.com.au), title ("Treasurer's warning to gold industry"), and content, which includes a link to a speech by Ben Wyatt. The modal also includes sections for "Info", "Activity", and "Macros".

Use Case



I want to have the piece of mind that every post has been responded to.



Components of Engage



The screenshot illustrates the various components of the Salesforce Engage interface:

- Social Studio Header:** Shows tabs for "social studio", "Northern Trail Outfitters", "Publish", "Engage" (which is selected), and "Analyze". A red box highlights the "Engage" tab.
- Post Headers:** Each post card includes a green checkmark icon, a purple camera icon, and a red box highlighting the "Load Posts" button.
- Profile Cards:** Each post card features a profile picture, name, and handle. A red box highlights the profile card for "Mary Klinger, MS, RD" (@kaziqueen55).
- Post Content:** Posts include text, hashtags, and images. A red box highlights the post from "Frolic" (@Designer_Frolic) about glamping.
- Post Metrics:** Each post card shows engagement metrics: likes (green), comments (blue), and shares (purple). A red box highlights the "53" comment count for the first post.
- Post Footer:** Each post card has a footer with a green checkmark icon, a purple camera icon, and a red box highlighting the "Load Posts" button.
- Inspector Panel:** An "Inspect Post" panel on the right shows details for a post by "Nick Clark" (@INTOutfitters). It includes:
 - User Labels:** Influencer, MVP Candidate (highlighted with a red box).
 - Content Status:** New content, not reviewed.
 - Comments:** Thanks for messaging us. We try to be as responsive as possible. We'll get back to you soon.
 - Media Preview:** An image of a yellow tent in a forest.
 - Interaction Buttons:** Share, Like, Save, Embed, and Delete (highlighted with a red box).
 - Panel Options:** Info, Activity, Macros, Conversation (highlighted with a red box).
- Post Labels:** The "Post Labels" section in the Inspector panel is highlighted with a red box, showing "Add Label".
- Facebook Integration:** The "Nick Clark on Facebook" section shows a post from Nick Clark (@INTOutfitters) and an "Author Labels" section with "Winback" highlighted.

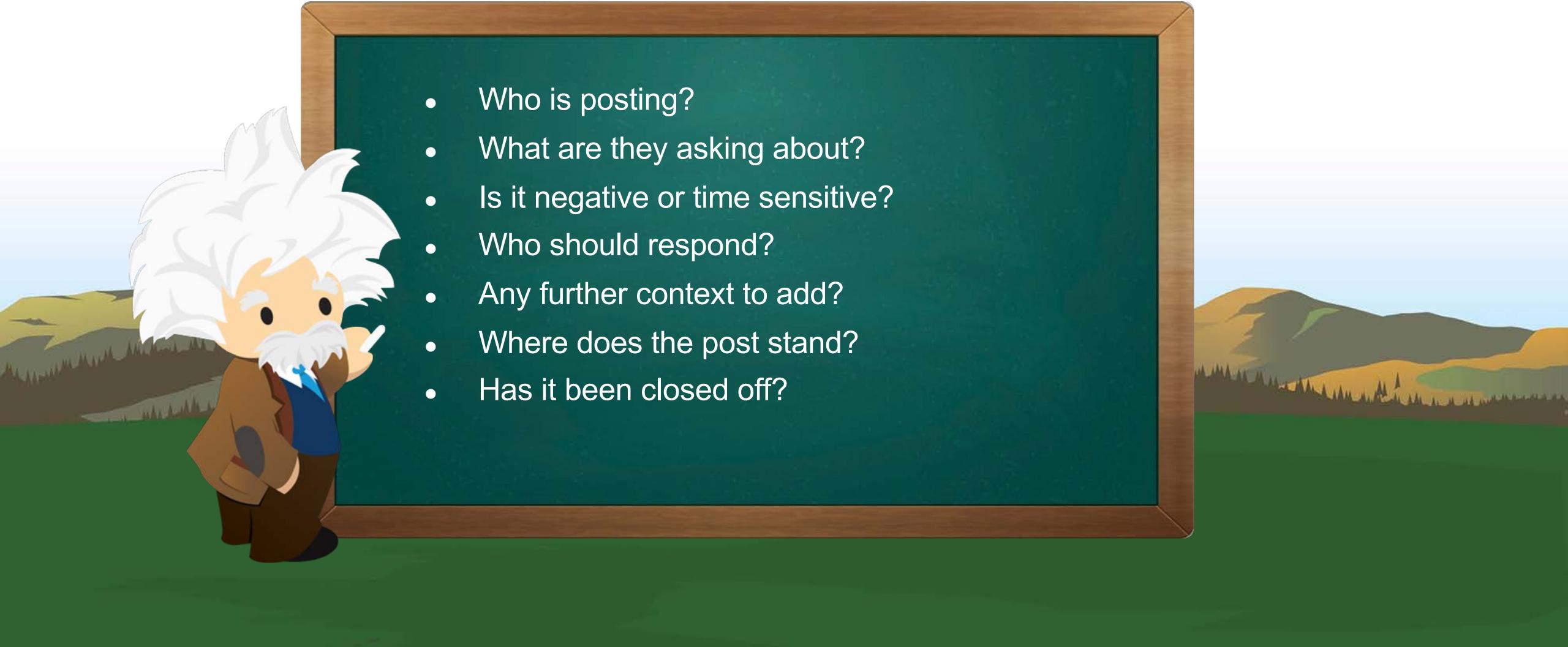


Things to consider

Before we engage it is important to ask...



- Who is posting?
- What are they asking about?
- Is it negative or time sensitive?
- Who should respond?
- Any further context to add?
- Where does the post stand?
- Has it been closed off?





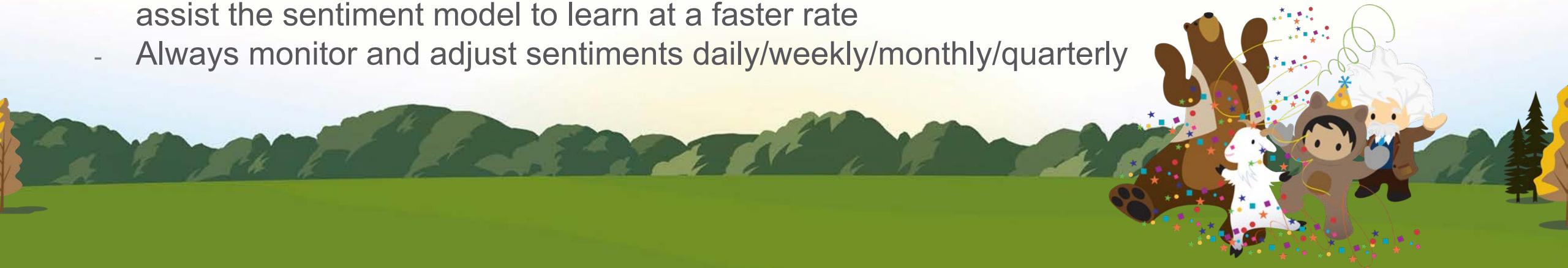
Tabs
Columns
Engage Macros
Workflow
Post Inspector
Sentiment Model

Demo

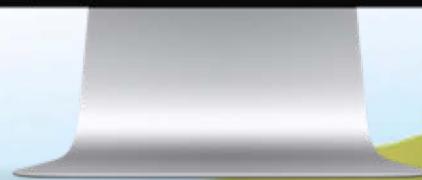
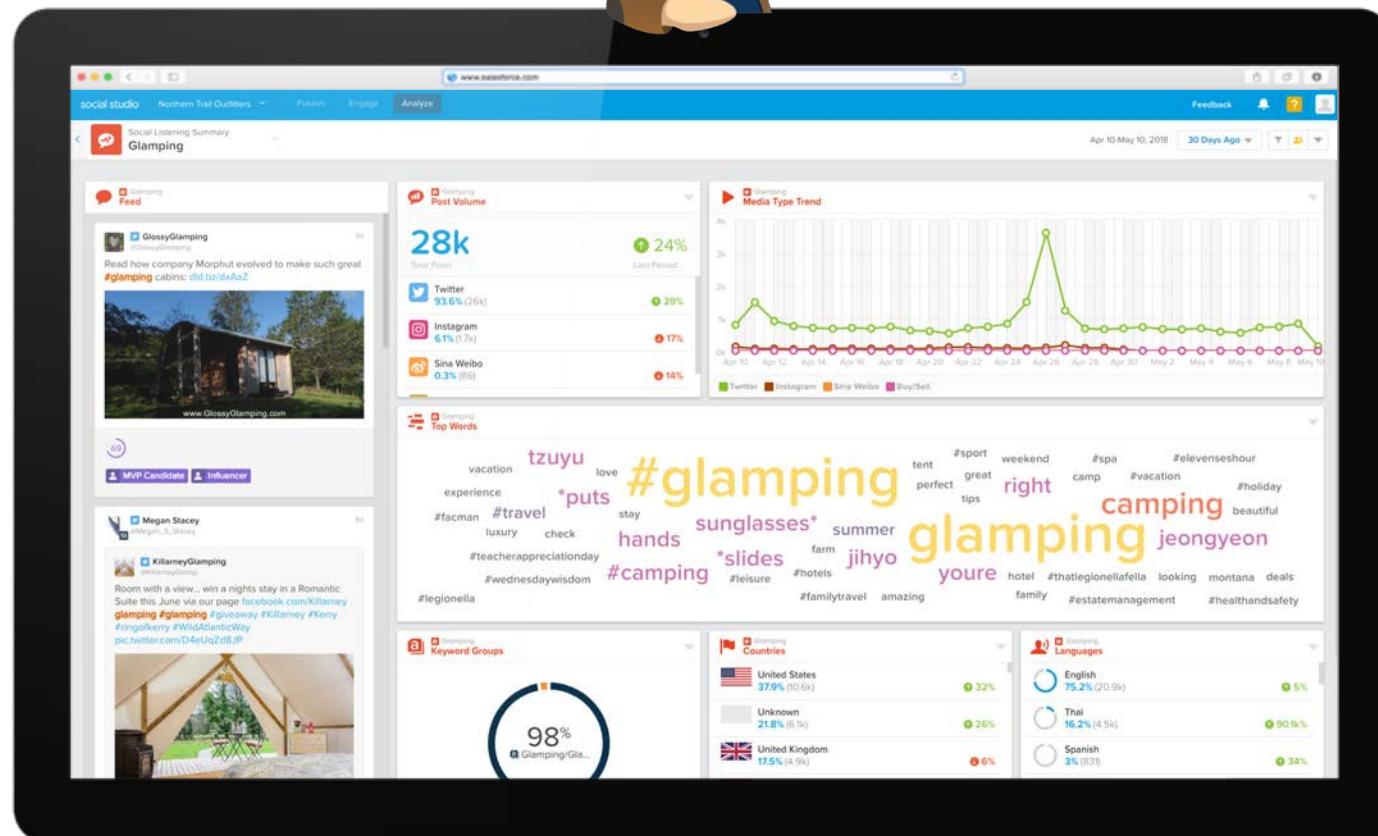
Best Practice



- Apply a strict workflow for your employees utilizing engagement macros
- Ensure there is a macro for every scenario of an incoming post that may occur 20+ times
- Utilize “Assigned to me” columns to ensure every post is responded to
- Close every single post after response
- Utilize the following Tab structure
 - Listening
 - Social Accounts
 - Assigned to me
- Step into the shoes of your customers, add in every variation of positive and negative words assist the sentiment model to learn at a faster rate
- Always monitor and adjust sentiments daily/weekly/monthly/quarterly



Analyse



Use Case



I would like to have a one page social report with easy to understand graphs that I can show my manager.





Dashboards Workbenches



Use Case



I would like to monitor what people are saying about my brand, competitors and industry.



Topic Profiles



Topic profiles are a social media search tool, created and used within Dashboards or responded to in Engage. Topic profiles contain keywords and filters.

The screenshot shows the 'Keywords & Filters' tab selected in a topic profile editor. At the top, there's a purple icon with a magnifying glass and the text '#NTOFail 100 EMV'. A blue box highlights the '#NTOFail' text. To the right is a grey button labeled 'PURCHASED'. Below the tabs are sections for 'Filters' and 'Keyword Groups'. The 'Filters' section includes 'Languages' (Any), 'Media Types' (Blogs, Videos, etc.), and 'Regions' (Any). The 'Keyword Groups' section shows '#NTOFail' selected, with a green checkmark, and a button to 'Add / Remove Source Gro...'. A note at the bottom says 'Include or exclude feeds from specific sites or twitter handles.'

This screenshot shows the 'Keywords & Filters' tab with a more detailed view of the keyword configuration. It includes sections for 'Contains Keywords (1)' (with '#ntofail'), 'And Contains Keywords (0)', and 'Exclude Keywords (0)'. A note at the bottom states: 'To search Instagram content, please ensure you enter text in a hashtag format. For example: "#tbt"' followed by 'Or'. There's also a button to '+ Import Keyword Groups'.



Example



Salesforce (Product Listening):

Contains Keywords: Salesforce, @salesforce, #salesforce, Salesforce Ohana, #salesforceohana

AND Contains Keywords: Sales cloud, Service Cloud, Marketing Cloud, Communities Cloud, Social Studio, Commerce Cloud, CRUX, DMP

Exclude: post from: @Salesforce

Bob Smith just posted on Facebook. “Salesforce Marketing Cloud Services team are the BEST”



Source Groups



- Source Groups are used in Social Studio to define a set of courses that you would like your topic profile to look at
- Social assets such as Twitter handle or a Facebook page, or websites such as blogs or forums
- Monitor competitors/influencers posts etc.
- Targeted listening
- Not compatible with Instagram



Topic Profile Tips



- Plan a topic profile
- Give it a relevant name
- Include all spelling variations as keywords
- Categorize searches using keyword groups
- Narrow searches by using filters
- Topic Profiles must be added to a workspace
- Make sure you keep an eye on your EMV
- Exclude your own posts



Use Case



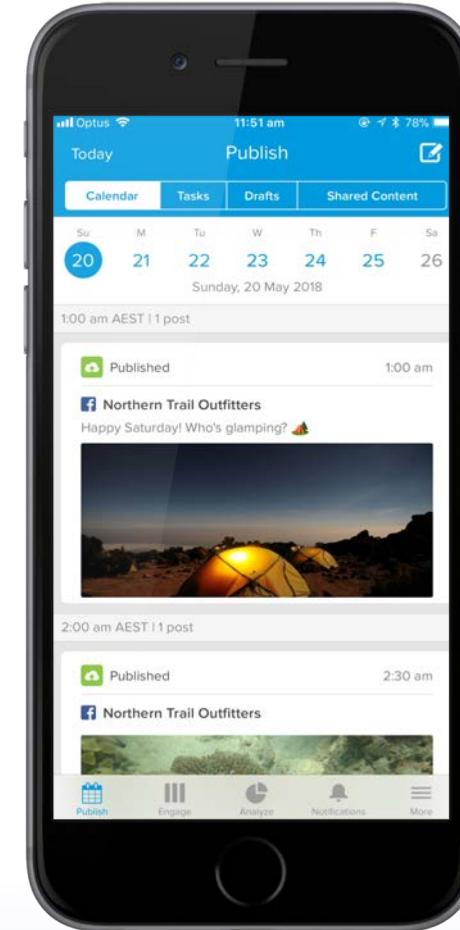
I want to be able to approve posts, publish post to my social accounts, and track the performance of my posts for the last week all on my mobile.



Social Studio Mobile



- Available on IOS and Android
- Download Social Studio app
- Create posts
- Use shared content
- Moderate and join conversations in Engage
- View Dashboards in analyse wherever you are
- Macros can't be created in mobile
- Workspace members must be added in Social Studio Web



Social Automate



Automate

System Admin Viewing as: Me Logout

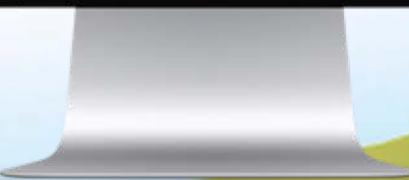
Home Data Sources Rules Connections Tools

Welcome to the Social Studio Automate!

Ready to save time and manual effort? Let's automate your post sorting, spam filtering, workflow assignment, triage to Salesforce, lead identification, stakeholder alerts, and more. Social Studio Automate is the tool that lets you apply a consistent brand approach to both your support and marketing interactions.

Step 1: Create a Data Source to identify relevant post channels
Step 2: Visit Rules to set the desired automatic Actions and any special Conditions

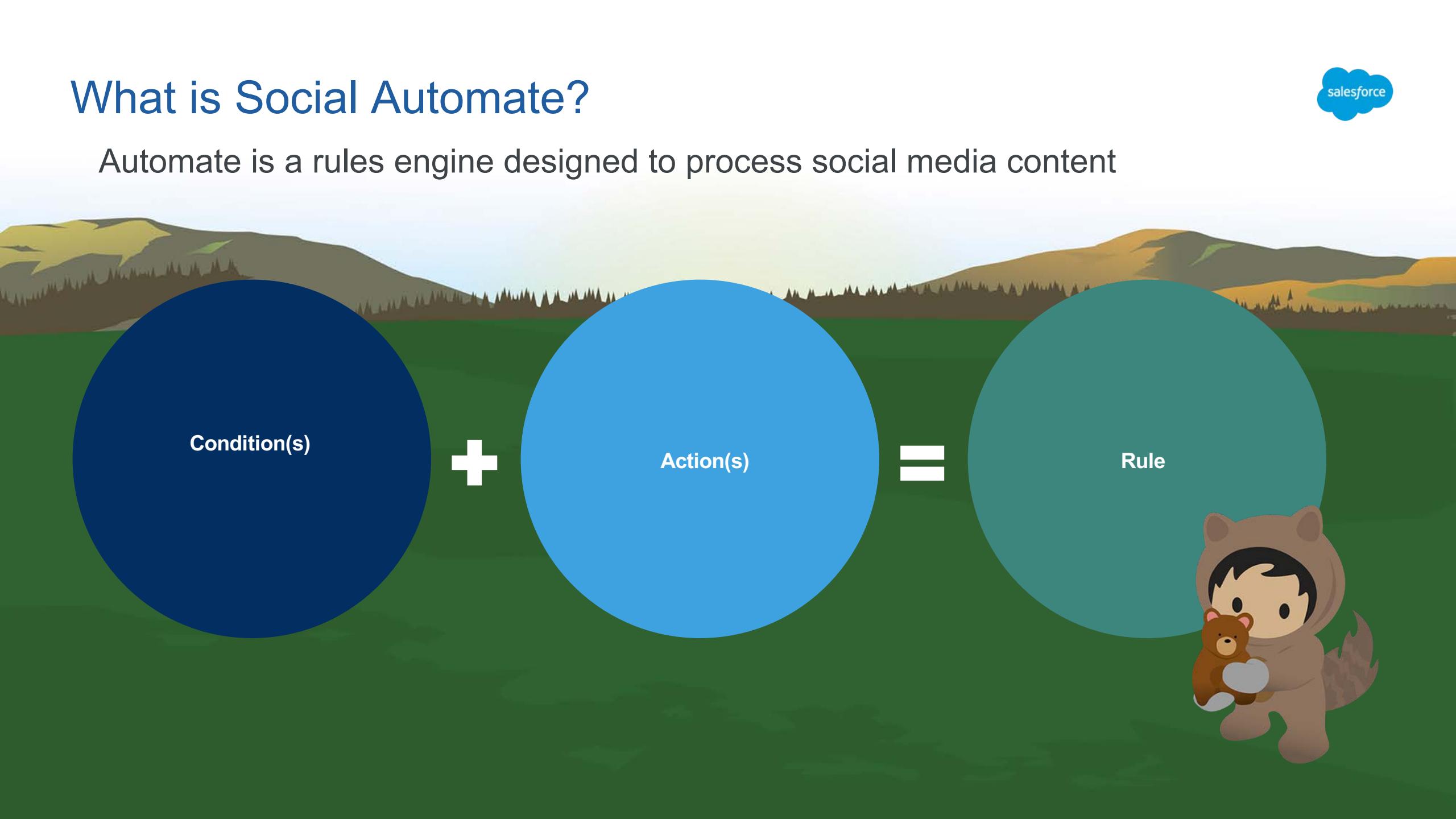
Read about all the latest automation features in our [documentation](#).



What is Social Automate?



Automate is a rules engine designed to process social media content

A stylized illustration of a landscape with rolling green hills, brown mountains, and a clear blue sky.

Condition(s)



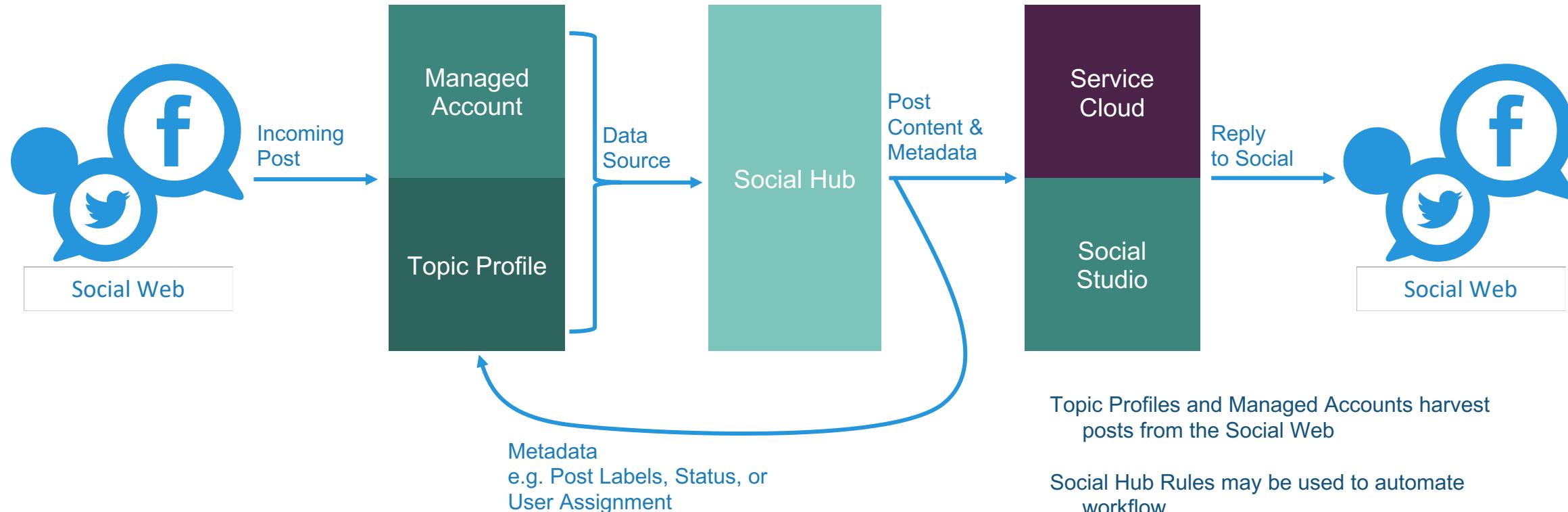
Action(s)



Rule



Social Data Flow



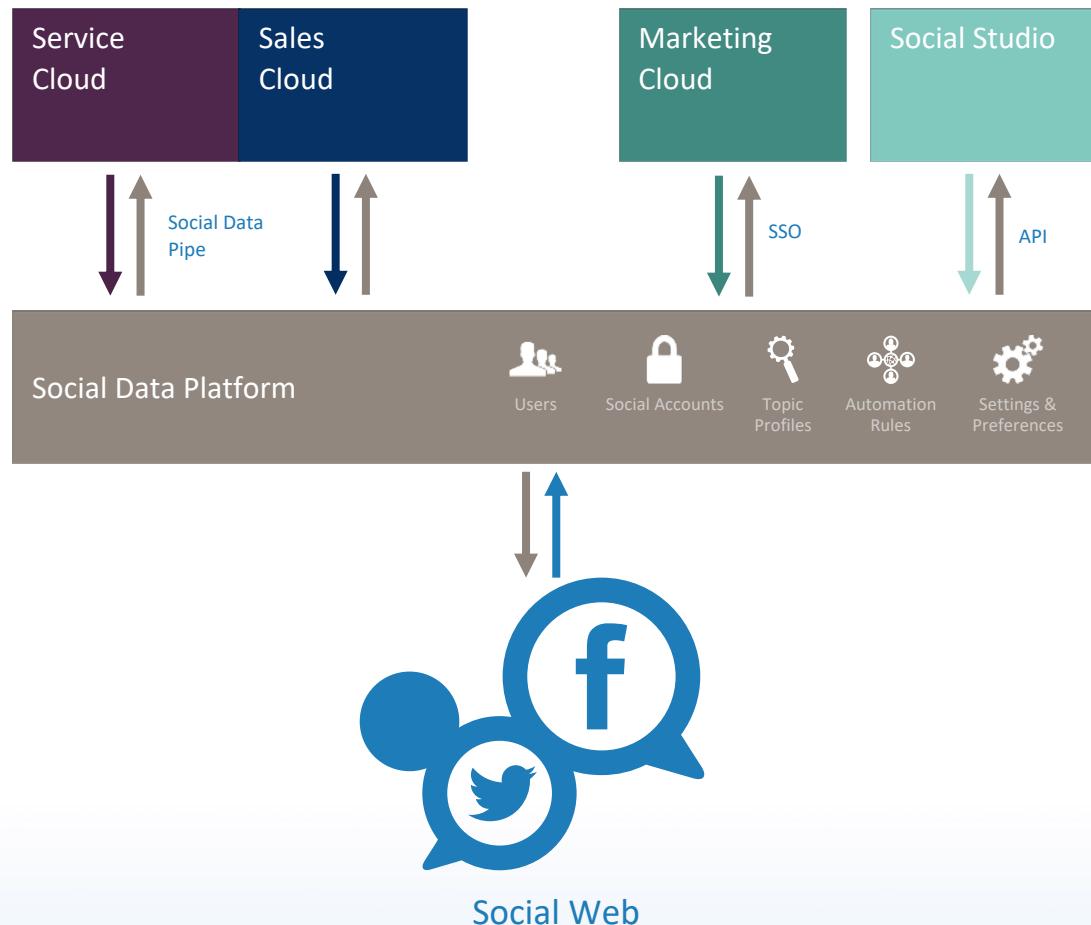
Topic Profiles and Managed Accounts harvest posts from the Social Web

Social Hub Rules may be used to automate workflow

Using Managed Accounts, it is possible to publish to Facebook or Twitter from Social Studio or Salesforce

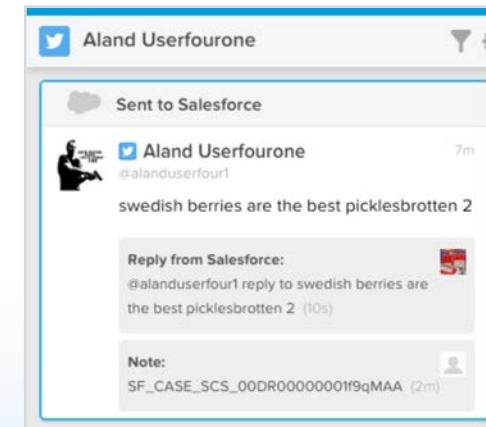


Single Platform



No matter which tool you are using,
you are always working with the
same social content

For example, when responding to a
post from Service or Sales Cloud,
the response will be visible in Social
Studio as well



Sample Configurations

Sample Use Cases

FIND & DELETE FACEBOOK PROFANITY

Delete any offensive content from your Facebook page

Condition

- Content/Content library contains match

Action

- Delete from Facebook

TRANSLATE POSTS

Translate foreign language posts to English, French, or Spanish; translated text is attached to post as a note

Condition

- Language is not English

Actions

- Translate post (works for any language supported by Bing)
- Customer must have Bing credentials

CATEGORIZE POSTS

Categorize posts on the basis of keyword matching, e.g. issue types or products mentioned

Condition

- Content/Content library contains match

Action

- Apply post label

REDUCE NOISE

Remove noise from your feed, such as retweets, posts with hyperlinks, posts containing specific words

Conditions

- Retweet status is retweet
- Post contains hyperlink
- Content/Content library contains match

Actions

- Apply post label
- Mark as spam

Sample Configurations Cont.

Sample Use Cases

IDENTIFY TWITTER INFLUENCERS

Prioritize engagement with influential Twitter accounts

Conditions

- Follower Count
- Verified status
- Author bio

Actions

- Apply author label
- Assign priority status high

ENFORCE SLA IN SOCIAL STUDIO

Make sure your response times are in keeping with your service level agreement

Conditions

- Actions have/have not occurred since post was assigned/created
- Post was assigned more than X minutes ago

Actions

- Assign post to manager
- Alert manager by email

SEND POSTS TO SERVICE/SALES CLOUD

Create Cases or Leads from social posts and respond to posts directly from Service Cloud/Sales Cloud via SCS

Actions

- Send to Salesforce (SCS)

VOLUME SPIKE ALERTS

Set email alerts on the basis of a percentage change in volume or on reaching a specified volume

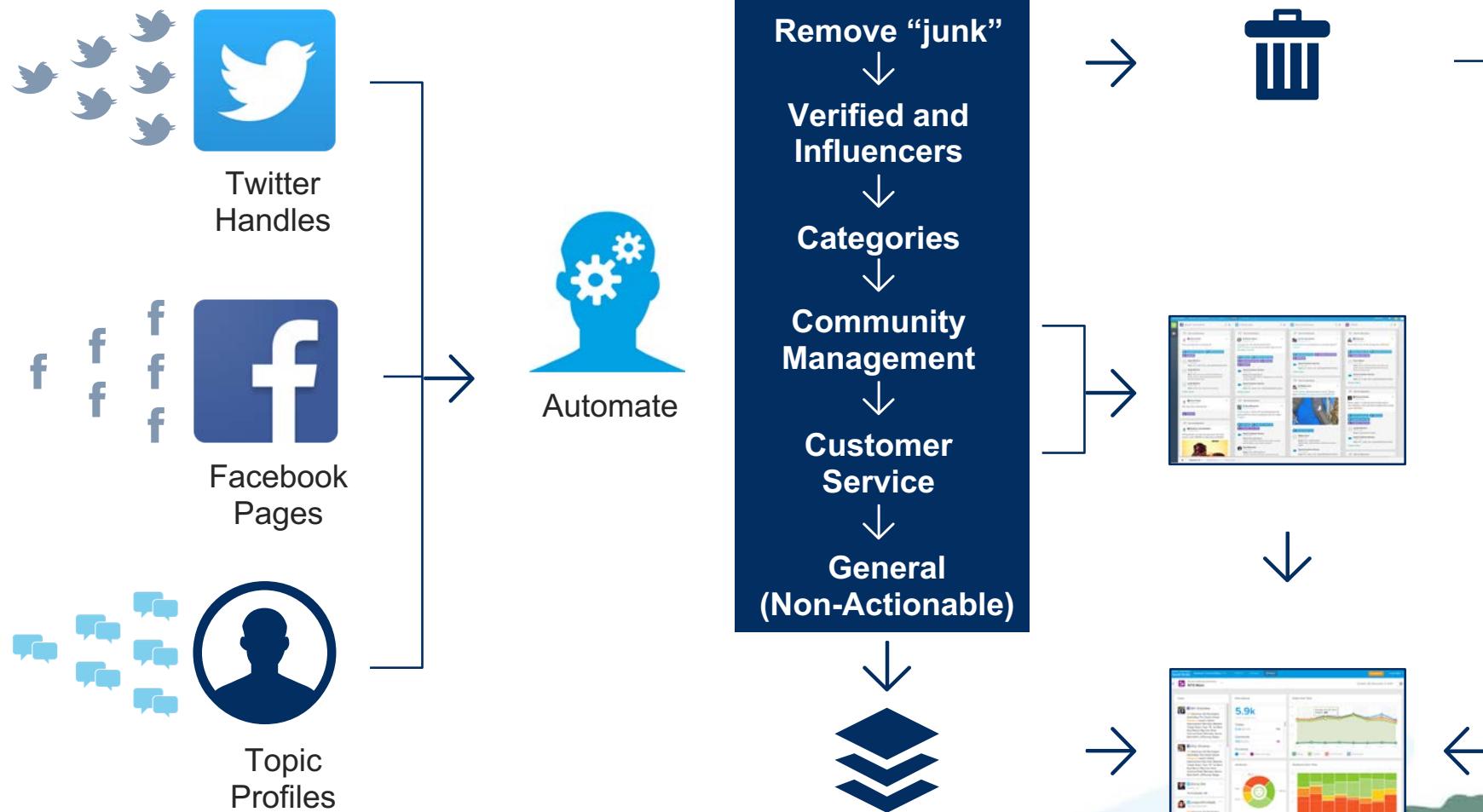
Actions

- Apply threshold alert
- Set up by Professional Services is recommended



Social Automation Use Cases

Automate configuration



Exam Hints



- User Roles and Workspace Permissions
- Best practice - workspace set up
- Post Inspector: Publish/Engage and Analyse
- Reauthorise accounts
- SFMC roles - user roles
- Macros: publish and engage
- Approval rules - parallel and sequential
- Dashboard metrics
- Boolean rules in Topic Profiles
- Available report metrics - difference between cross workspace, content performance and post report
- Limitations in Mobile



salesforce

Questions?



Thank You

