STRATEGY AND PLANNING

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LESSON 1:
PLANNING
SOCIAL MEDIA
STRATEGY
The purpose of social strategy

The purpose of your social strategy is to address the ‘why’ of your business. So, the problem with social media is that sometimes we go into it without any specific goals. We just feel that because it’s something that we use on a daily basis, that it’s in our hand and in our phone and on our apps, that we know it and we understand it. However, like other channels, I don’t know how to buy TV, but I know how to watch TV, so we need to actually bring ourselves back to actually understanding this.

So what we’re going to do is we’re going to go take you through a very step-by-step stage-led process of how to develop and design social strategy. It is built with purpose in mind, and it’s also really important that through this process, there’s no silver bullet for social media.

We’re going to give you the framework, the support, and the background to be able to actually answer the challenge for your business. The solution is completely different for your brand or business and the next brand or business. If you copy what another brand or a business are doing, it sometimes won’t suit what you’re doing specifically and really the strategies that work are the ones that are fine-tuned and customized to your challenge.

What is social strategy?

‘Strategy’ is probably one of the most overused words in our industry and in most organizations. We all know what the word means, we all have used it, but unfortunately, we use it too much. And because of the fact that we use it too much, we often actually misunderstand it.

So strategy is about a long-term goal. It’s about answering that long-term goal. There are four specific points to strategy.

- **Social strategy**: This is the overarching kind of blueprint of how you operate on social media, but out of this, come other strategies that are important to identify.
- **Content strategy**: When we put our content out there, why do we do it? What are the guidelines? How does it operate? But more importantly, that that is guided by our overarching strategy.
- **Media strategy**: Media is any ads that you may buy or any integration you might have with, let’s say, a media publisher or website. It’s important, again, that we have guidelines for that, we know how to do it, and that it is all being informed by our overarching social strategy.
- **Tactics**: The most interesting thing about tactics is that tactics are often confused as strategy. You know, “Our strategy is to post on Facebook.” That’s not a strategy, that’s a tactic. So really what you have to do is try and actually almost limit your use of the word ‘strategy’. Try and think more like, “What do I need to do?” And if you can spend time developing your overarching strategy, that’s the roof over everything that you do. You’ll actually be able to use that to really cleverly inform absolutely everything you do. Your media and your content will be very closely aligned.
What is a social audit?

An audit is where you take a look at everything you have currently, and you identify how it is performing, what actually exists, and what you’re working with.

To do this, what you need to do is, first, go through a checklist.

Social channels

Do they even exist? And if they do, what are they? Is there a YouTube channel? Is there Twitter handles? Is there a Facebook Page? Is there a Snapchat account? Some of the channels that you will use won’t actually always be something that will be identifiable searchable. For example, a Snapchat account, if you Google search, it won’t turn up. You’ll have to ask around your organization to make sure that someone hadn’t set something up without your knowledge.

Duplicate accounts

This is common in small-to-medium enterprises and larger organizations. At some stage social media was owned by another department. They thought it was a great idea to create a Facebook Page for one campaign that they had, or they created a Facebook Page for one part of the business. So, it’s important to identify if there are multiple Facebook pages or multiple Twitter handles. Are there any duplicates? Do you need them? Will they be required? Start to note all of this down.

Access and login

Many companies have multiple channels for a specific brand, multiple Facebook pages or Twitter handles, and they can’t remember the passwords. They don’t know who set it up, so when you forget the password and try and claim the password, there’s no email address to get it sent to you. And that’s a massive challenge because that’s going to confuse your consumer when they’re actually going to find you. That’s another distraction or another kind of turn in the wrong direction if they find it. Or worse is that if somebody has a complaint and they direct it at the wrong channel that you don’t have control over.

Admins

On some of the channels, it’s required that you have administrators. So these administrators can be administrators of the channels themselves. A Facebook Page requires an administrator. When you get down to buying advertising, your ad accounts actually need administrators. So now is the time to figure out who actually has access. Should they have access? Why does somebody have access?

In large organizations, you will come up against politics. Somebody might not be willing to relinquish control over something they always have. You need to understand why they have access and whether they need it. Come up with an argument as to why they maybe shouldn’t have access anymore. It’s an important thing to consider.

Existing resources

How much resource is currently allocated to the social media work that you do? It’s important to identify straight off the bat what is actually being allocated to social in terms of time, people, and
money. Because what we’re going to start to do is create your argument for why you should get more. Is the business investing the same amount in social media they were three years ago when it was half the size? These are really good points to try to make the argument for more resources.

**Chain of command**

This is probably more for larger organizations, but what can happen in chain of command is that social media comes up under multiple departments. What happens there is that you’re going to hit politics. Politics can actually be one of the most frustrating barriers to any social media work and something that really want to avoid. Politics are what can slow down process. It can cause speed bumps, and even stop you from doing great work.

**History**

There’s so much data and information out there. It’s important to identify what data you have of past performance. What has actually been done? And then consider history of past campaigns and past efforts. What type of content has been done there? Start scribbling down as much notes as possible so that you can start to develop a picture.

If you’re an organization that currently does social media, that does not mean that the social audit is not going to be relevant to you. You should always take stock of what you have if you’re going to reassess your strategy because you need to know all of the different elements.

**EXPECTATIONS**

**Why are you developing a social strategy?**

You must understand what your use of social media is going to be. If you’re a small company or a small business or a medium enterprise, or even a larger organization, you need to clearly understand this from the outset. What do you expect social media to do?

One of the biggest distractors when you look at social media is that idea that we all have access to it. Everybody straight away thinks it’s going to change their business instantly. You won’t see results instantly. If you can outline your expectations straight away, particularly, if you have superiors, they’ll know straight away what actually are the objectives.

**Customer engagement**

This is a connected world. Your consumer is using social media. There are over 1.5 billion people using Facebook. It’s important for you to identify that that’s a great opportunity and a great channel for you to be able to actually speak directly to your customer.

One of the benefits of social media is creating the perception of this one-to-one relationship that you have with your customer, and that’s very valuable.

**Business performance**

This is becoming a much more evolved area in social media as the platforms become more dynamic and broader. Social media is about engagement, first. However, it’s no longer just about that. It can actually drive business performance, but it’s very important that you outline exactly and clearly what the performance is that it is expecting.
Campaign performance

If you’re a brand that operates in campaign basis, this is a great tool to affect campaign measures. Whether you’re trying to get reach or awareness or drive sales, there’s something within there.

Customer service

This is often overlooked because people see it as a simple tool, but social media is the equivalent to somebody ringing your business on the phone. You can create, again, that perception of a one-to-one relationship. Somebody can either walk away happy or walk away disappointed. The difference between the phone call and social media is that somebody who is disappointed has the ability to put their disappointment in the public eye and actually be more damaging than coming away from a phone call disappointed.

Business performance

In terms of business performance, the expectations might be often misguided by solely looking at sales. And if your business is measuring performance of social media by sales, then there’s a massive challenge there because you need to understand how that is actually working.

When talking about business performance, there are a few key measures.

Awareness

How aware is your customer of your product or your service through social media? And this can be measured by using focus groups, so gathering people together who are from your target audience and asking them how much they are aware of your social media activity. This could be looking at the comparison of your paid impressions, so the impressions that you pay for, versus your organic impressions. Are your organic impressions sizeable? Are they growing? Are you reaching more people based on the fact that you’re actually operating on social media?

The real kind of pure metric of social is your engagement metrics. The amount of people you see versus the amount of people who engage, what percentage of them are actually engaging? Finding your benchmark and then actually working towards that.

Sales

Sales can only be tracked if you can track the sale. If you’re an e-commerce business, you have a very effective use of social media because you can track the person who has clicked on your ad, gone on your site, and created the sale.

Where it becomes more challenging is when you have to understand the customer journey. You need to understand what impact social media is having on the sale. So sometimes, social media isn’t the final click or the conversion. Sometimes it’s warming up the customer, or sometimes it’s a video that they’ve seen to give them new information. You need to actually be able to understand that before you can really track sales.

And this is important knowledge, because if you have a superior or a managing director or marketing director who purely wants sales, then you need to educate them that it isn’t just the point of conversion – it’s actually a lot more than that.
Site visits

One of the most valuable things that social media can bring to your business is that social media offers that added value in driving more visits to your site from your social media. And these aren’t costing you money. It’s equivalent to your organic search. If somebody is going to your site based on content that they’ve seen, and you haven’t had to pay for that click, then that’s a piece of value for your business.

Leads

Brands often expect people to arrive on their site and just convert. Remember that, particularly for services, you should have forms on your website that are capturing leads and you should also be tracking where those leads are coming from, and tracking the follow through. If somebody has contacted you, and that somebody has then been contacted and it results in a sale, then that sale should go down as a sale that has been attributed towards social media. Being able to actually track that is very valuable.

Sentiment

This can be mysterious because it’s very difficult to track because of nuances in different languages. Particularly, here in Ireland, we use the English language very different to the way it is used elsewhere, so sometimes it’s very difficult to actually understand sentiment. Somebody who is saying something that in another country might sound negative, actually in an Irish term, is positive. So sentiment is something that if you can track it, you can track it observationally or you can use tools. What you can do is see how positive people are towards your business.

Customer engagement

Many people see customer engagement as a kind of buzz word that gets used by social media to actually just give it an excuse for not having a performance. But what we need to do with engagement is break it down into its parts.

Insight

Why is someone engaged with me? What have we done that has made them engage? What do we learn from that? And actually, over time, when we build up the knowledge around our audience on specific channels, we can actually take massive insights for our business based on that. Do you have a product in multiple colors? Does one color get more engagement than another? Why? And could you ask your customers what colors they would like to see. There are ways that you can use social media to actually inform business decisions.

Awareness

People engaging with you actually shows that they have an awareness of your product. If they’re asking questions, if they’re talking to you, then they have to have some level of awareness of what you’re trying to do.

Sentiment

People are talking about your business and channels. Whether it’s Twitter, whether it’s comments on Facebook, whether it is tags on Instagram, they are showing you that they are using your product,
they like your product, they enjoy your service, and they enjoy your brand. They’re telling you what you need to know. And they’ll tell you what they don’t like. And what’s important then is what you do with that information.

**Site visits**

If your customer engagement is resulting in somebody actually going to your website, then that’s a piece of value for your business.

**Earned media value**

This is something that, often times, isn’t discussed. But if you are having organic impressions and those organic impressions result in organic engagement and you don’t have to pay for it, it still carries a media value. And that media value is important to you. If it costs you $1,000 to get a million impressions and you get another 200,000 impressions organically, then those impressions are worth $200. So you need to actually understand that that extra reach or that extra impressions are actually holding value to you.

**Customer service**

Customer service is often something that gets overlooked because it’s seen as complaints and how we deal with complaints. But actually, change it from customer complaints to customer queries or customer interaction.

**Awareness**

This is where it’s important, because, through your customer service, you can create a level of awareness. Somebody has a query about a product, you can answer their question and resell them on another product, or an accessory, or a secondary service, and these are very important things to understand.

**Reduced customer service costs**

You can actually reduce your customer service costs. What three or four or even one person can do managing your social media channels might actually require two people on a phone. Over time, if you can, move your complaints and your queries to social media, which to a consumer is way more comfortable. They don’t want to have to talk to someone on a phone, they don’t want to go through a menu system, they want to be able to ask a question and get the answer. You could actually be able to filter some of the general queries and general concerns to a channel that is much faster and more efficient to answer questions.

**Insight**

Insight is the information that you take from how people are engaging. Through social media, you can identify when there is a problem with one of your products straight away because your customer will tell you. You can also, on the flip side, identify the parts of your product that they love. You should be taking learnings from this and understanding how you can iterate that into the next generation of a product or a service. Or is there the ability to offer new services based on the fact that somebody has told you that they have a need that is not being met?

**Sentiment**
There are so many examples of brands online that have answered complaints flippantly, incorrectly, or even rudely. And if you have ever experienced this by a brand, it leaves a bad taste in your mouth with that brand forever. If you can address somebody’s complaint and a negative piece of sentiment online positively and proactively, you have the potential to turn that customer into a more positive customer than some of your existing positive customers.

It’s that ability to create that attention to the customer that actually makes them more positive, so definitely identify the fact that addressing negative sentiment through customer service on social media has a massive effect on the positive sentiment towards your business.

**Campaign performance**

A lot of the measures we’ve already talked about come into this.

**Awareness**

You can create awareness of a specific campaign, you could drive sales of a specific product or service within campaign, or generate leads from that campaign. You can generate site visits, create positive sentiment, and have customer engagement.

These are all things that are the exact same to everything we’ve discussed.

**Sales**

When you ask many people why they want to develop a social media strategy, they say, “Sales.” If you just want sales, then you’re under-utilizing a platform that can offer so much more: customer engagement, interaction, and sentiment. If you’re just chasing the sale, then you’re just shouting at people and telling them to buy things, and you wouldn’t expect that to happen in any other channel. It’s really interesting to see that we hear the word “ROI” and return on investment being bandied around when you talk about social media. The challenge with return on investment is that people instantly start thinking about dollars, when actually it’s a return on investment. That return can have many different meanings. And, what’s really important with these meanings is to think into the future.

**Why are you developing a strategy?**

Setting goals is important, but having a vision is even more important. Too many brands and too many businesses use social media and dip in and out of it, or have a strategy this month, and a new one the next month, and a new one the month after that, or even a strategy one year and a new strategy the next year; or they use Facebook but now Snapchat’s fancy and they’ll move to Snapchat. It’s important that you actually set long-term expectations for social media. It’s not going to happen overnight.

**Timelines**

There’s this opinion that social media is a quick fix. It can be a quick fix, but you’ve got to pay first. Or where it does offer a lot of value is that long-term build. That build over years of understanding your audience, knowing what they want, and actually generating a lot of value for the business from one specific platform. So, it’s important to guide your superiors in getting them to not rush and expect results straight away. You have to temper their expectations. You have to tell them they have to give you at least three years before they really judge what social media is doing.
Now, that sounds scary, but it's your job to tell them that you're going to check in every month, every quarter. You're going to do annual reviews, and we'll go into this, into how do you actually sell a superior on that scary thought that they might have to invest in something for three years before they actually see proper results?

**Key performance indicators (KPIs) vs key success outcomes (KSOs)**

**KPIs**

So, what we're going to do is, for those of you who are familiar with them, is we have the word KPI. So, that's a key performance indicator, and it's a number. And, the problem that we had for a very long time in social media is that we were just reporting numbers on numbers. I was saying to my clients, “Oh, we had 3 million impressions. Isn't that great? That's a big number.” In reality, we didn't know what it meant, so what we're doing now is we're moving from KPIs to KSOs.

**KSOs**

These are key success outcomes.

What is the most important thing for you to have is a success outcome, because your superiors or the business want to see success. What would you rather display, one number to them and tell them it's good, or would you rather show them something that is an exact representation of what is happening in the business that social media is affecting? This is why KSOs will be something that we'll talk a lot more in detail.

KSOs can be made up of a number of KPIs, but really what you want to do is you want to have that answer to that question for your superior. When they say to you, “I want social media to do X,” that's what you want to answer. If your boss says to you that, “I want social media to make my customer love me,” then you need to go back to them with sentiment measures, so real specific numbers to make sure that you're answering your job.

For a long time, we're trying to chase success in numbers, when really actually it's a lot more simple than that. People want to see success in kind of finite reasons, finite examples of what success means, and we need to identify them. And, the reason that this is a challenge is because a lot of businesses identify social media as a sales tool or a revenue generation tool.

And, straightaway, that limits you because, unfortunately, unless there is a direct tracking mechanism between your social media activity and your sales, you actually can't understand the level of impact social media is having on that sale or on your business. You have to remember that social media isn't just the next new channel. I would argue that social media is one of the largest revolutions of the last three generations. It is not only changing people's behavior, it's changing how they act in groups, it's changing people emotionally, it's having such an impact on us that we can't understand the level of impact it has on our sale unless we have a deep knowledge of that. If I ask you today, if somebody tweets about your business, and then that same customer, at some stage down the line, has purchased your product, what value of the purchase does social media take? It's very difficult to understand.

**Social return on investment**

There is no magic formula for ROI. And unfortunately, if anybody tells you that they have a magic formula for ROI, they are lying to you. It is built over years of understanding your data, and something
that we offer as a service is something called Econometrics. It’s a very expensive product to actually track all of this, and it involves using millions of lines of your sales data, your social media data, your TV, radio, press, digital, everything combined to actually understand each individual piece and its value of every euro you spend. It’s very complicated, so it’s very difficult to be expected to have that answer, and that’s why we go back to the key success outcome. Can you understand the relationship to the sale? If you know that when people watch videos on social, that your sales increase, then that’s your success outcome: video views, retention of that video. It’s important to understand that you don’t necessarily have to have the answer to the formula, you just need to know that the formula works.

**RESOURCES**

**What resources do you need?**

Resources can often be confused as just money, but the problem with resources is that if you just thinking money, you’re not actually identifying two very key resources in addition to money that social media needs.

- **Time:** You need to dedicate the right amount of time to social media because it is an incredibly manual platform.
- **People:** You need to be able to have the right people there who understand the platforms and who know what they’re doing. This is a really underestimated resource. Finding the right people for social media is a massive challenge because it’s becoming such a broad channel. And the biggest challenge we have is that when you interview someone or when you bring someone in is that we use it in our daily life. That does not mean that you know how to use it as a marketer, and that’s what you have to differentiate, is between the person who knows how to use social media as a consumer and the person who knows how to use it as a marketing channel.
- **Money:** You need to buy ads. Businesses that say that they’re going to be so good at social media that they won’t have to advertise are losing out. If you’re so good that you don’t need advertising, imagine how much better you would be with some advertising. If you can reach a million people through viral content, with the advertising behind it, you might reach five. Just remember that the earlier that you can commit and the earlier you can get your superiors to commit to investing revenue into social media, the better the performance will be.

**Resource maps**

A resource map is very important in helping you identify the resources that you’re going to need. A resource map is a really rough piece of work. You can do this in a notebook; it doesn’t have to be done on an Excel sheet. You can scribble it down. But, it is important to start to estimate how much time and how much money it’s going to take for your teams to actually execute the channels that you have. And then work out actually what is available because then you’ll very quickly be able to see the discrepancy and where you need more resource in certain sections.

You can break this down into:

- The hours required
- The current ad spend
- The production budgets
- Training
There are four areas that, very quickly, you can understand what’s required. And what’s interesting is that normally what happens is the ad spend is light, the training is light, and we’ve just pumped time and hours into making things. This is where you can balance it out.

So, you would look at your estimate for each channel, so ask the teams or talk to who you’re going to be working with and identify, “How many hours do you think we’ll spend on Facebook this week, on Twitter, on Instagram, managing Pinterest, using Snapchat?” This might be 30 minutes, 20 minutes, two hours, three hours, four hours, then actually sit down and start to go, “Okay, well, ideally how much time per week would we like to see being done?” This isn’t right now about having the right answer; it’s just about starting to plan things out so that you can start to build a picture in your own mind. This might be completely wrong, but quickly you’ll be able to see whether or not your expectations are actually going to be met.

One of the ones I would really call out training as it’s something that we underestimate, and it’s something that unfortunately results in businesses being left behind on social media, is that they don’t allow for training time. Now, training time doesn’t mean that you have to go pay for courses or, you know, after that you have to go and actually invest loads of time in it. Sometimes it’s just spending that extra half hour reading up, making sure that the people who work on your teams know that they need to spend a certain amount of time learning new platforms, learning new formats, and then as you grow, is identifying those key opportunities to invest in training, and in good training.

So, as you’ll see, we start to build the resource map in terms of the resource required, in terms of funding in hours, and you can start to identify the discrepancies between them, and then start to ask yourself, “Why do they exist?” Do you expect too much, or actually is there a problem with the level of timing, and resource, and money being invested in the business?

**BUDGETS**

**Spending on media**

This is always a scary thing for anyone to start to identify, because budgets is somewhere where we assume that once we put the people there, they’re going to just write copy, and they’re going to take pictures off Google Image search and they’re going to put them up.

That’s really not the way social media operates anymore! You’ve got to be more professional. So, this requires people to be there to write copy, people to be there to create bespoke imagery, to design, to shoot video content, to manage your advertising.

**Setting targets**

And, it’s important that you need to identify, now within your budget, what actually can you achieve? So, really interesting one is how many people are in your target audience? That’s going to tell you roughly how much ad spend you need. Like, if you need to reach two million people, that’s not going to happen organically. You know, you need to identify how much budget you’re going to need to start to allocate to ad spend. And, how many people could you realistically service as customers in a given year?

**Percentages**

How many customers have you targeted for the year? What percentage of them would be a healthy amount to get from social media? 10%, 15%, 20%? Try not and push yourself to try and do too much
Too quickly. How much money are you willing to invest in social media? So, how much in total are you willing to invest? Because, if the first question said that, “Oh, I need to spend $20,000 a year to service an ads account,” and straightaway you realize now, “Oh, I thought I was only going to spend $20,000 this year,” then you know that your expectations are out of whack, and you need to go back to the drawing board and figure out where you should be in terms of your spend. Are you under-investing and limiting your impact? This is what a lot of businesses do, is they’ll throw €100 a month on ads, and they’ll spend €2,000 to €5,000 a month on actual creative. Why are you spending €100 on something that cost you €5,000 to make? It doesn’t make any sense.

You need to find balance within what you’re doing, and we’ll talk about this in a lot more detail. But straight away, you start to identify these problems not because you’re going to fix them straight away, just because you’re going to put them into your head to make sure that you understand them, to make sure that, as you go along, that you’re making sure these aren’t mistakes that are made. Are you allocating enough ad spend? We said this already: How many people are in your target audience? How much are you going to spend on your ads? And, are you really getting there? Are you reaching the right amount of people? Have you allocated enough budget to cover busy months or campaigns?

Something that a lot of brands do, which is a huge mistake, is taking their budget and dividing it by 12. If your products and you have a Christmas period, you can’t divide it by 12. You need to understand the ratio of the importance in the months. Take your 12 months and start to write in, out of 100, what percentage of dedicated time, and resource, and money needs to go into each specific month.

Budgeting plan

A budgeting plan is very simple. You have four sections, and then you have all your months, and then you have a total at the end. Now, you can do this quarterly, you can do this half-yearly, or you can do this annually, depends on what way your budget structures actually work.

Team costs

What you need to look at is really detailing line-by-line within the sections that are important to you, such as team costs. So, you know, you have your salaries, you have training dedication, you have recruitment, if you know that in a specific time you want to hire more. You’re starting to plan this out.

Media spend

How much will be spent on Facebook on ads, on Twitter, and on Instagram? Are we allowing for space in our budget? If we know that Snapchat, at some stage before the end of this year, will launch an ads platform, are we prepared for that? Do we know that we have the ability to implement those ads straight away? Because being the first mover, for some brands, is very important.

Agency costs

This is something that we’ll discuss in more detail, but do you have an agency? If you use an agency for production, for media buying, for management of your profiles, are you allocating enough spend to allow that agency to fulfill their work? And, working for an agency, sometimes a client has, all of a sudden, not got any budget, yet they want you to deliver the world to them. So, you need to understand, how much money are you allocating that agency versus your expectations of what they’re going to give you.
Tools

As you grow, and as you become more developed, tools become something that make your team and make your work more efficient, and it’s important not to overlook the benefits they can offer. So, I’ve put in here tools that we use in terms of like, social listening. We use a brand watch, and in terms of management tools, we actually use a really simple tool called Spread Social. Some brands use more expensive tools like Sprinklr, but it’s to understand what is the size of your job, and what actual tools are going to benefit you.

But making sure that you’re allocating all of this budget together, because then, very quickly, you have a blueprint with costs allocated to it, and you can go to your superiors and you can put on their table and on their desk. You’re not going to them with the number and saying, “This year I need 95 grand.” This year you’re coming to them and saying, “I’m going to need 95 grand, and here’s absolutely every single thing I’m going to need it for.”

Media spend

There’s always that struggle between creative and media trying to get budgets. Now, what can happen here and can become dangerous is your ratio being imbalanced. It can be imbalanced in both ways.

Focus on creative

The first is being imbalanced towards creative. If you’re allocating in excess of 60% of your budget to creative, then you’re actually not servicing the creative that you have spent so much money on to actually deliver it through ads.

Now, the reason that that’s important is because creativity alone will not deliver anymore. And, back in the day when Facebook decided things were viral, and showed it to a lot more people, you could go viral a lot easier. However, now with the organic reach decline, these platforms are commercialized now, and they want you to buy ads, and that is how you reach people. But it’s important that you don’t put them out of balance.

Focus on media

Same goes for spending too much on media and not enough on creative. Why spend so much money just shoving something in front of someone’s face, that has no creativity and is not designed to create engagement or actually encourage them to respond to you? So, again, the challenge is to find the balance. That isn’t always necessarily 50/50, sometimes it’s 60/40 in favor of media, sometimes a 60/40 in favor of creative. Sometimes there are examples where you can go beyond 60 for creative. You just need to know that it is the right idea, and that you’re using other ways and means to actually reach people, whether it’s using influencers in the idea, whether it’s using celebrities. It’s to make sure that if you’re not going to be spending the money on ads, that you’ve got something else that’s going to fill that gap.

Requirements and costs

And an important thing, and this comes from me working in an agency, is the ability to understand requirements and costs. Everybody wants to do the huge, amazing, first-time—it’s-ever-been-done campaign on social media. The challenge that I have is that if you look at the graph, is that, as we get more complex, our costs go up. And, what you need to understand more importantly is that if you’re
using an agency, is that sometimes ideas that you have in your head that seem simple, actually aren’t that simple, and actually involve quite a lot of work.

So, a simple post that is being written for a Facebook page, that requires a copywriter. It also requires an art director and a creative director to come up with the asset that’s being used. So, remember that the things that you put out on social media can be done simply. And, if you want it done simply, you should do it yourself.

But, if you’re using your agency to use a third-party for more creativity, and the access to using technology or better design, then you need to be prepared to actually pay for it. Now, that comes with its own warning in that you shouldn’t just throw your money at an agency; where possible, do as much as you can in-house, because in-house is where your people will learn the most, and it’s where actually you will get the most success because they’re the most attentive. Your agency is going to be dipping in and out, hour by hour, and that comes from someone who works in an agency. We can’t spend eight hours of the day working on your business, we have multiple clients. What you can have is your employee work eight hours a day on your business, or you yourself, which brings us to the next section which is talking about ownership models.

**OWNERSHIP**

**Simple vs complex**

You can use a variety of ownership models that we can use. There are different departments where social media can live, but there’s actually some ways where you can kind of use this ownership model to actually figure out what’s the structure for you.

There are simple models and there are more complex models. The more complex models are for the larger businesses, and you’ll see that as we go along. But really, social media has benefit towards four areas of the business. So, you have PR, marketing, social media, customer service. There are other sections of the business where it can add value, like propositions, product, but it’s more than that should be a touch point.

**Social media integration**

What’s very important is understanding that successful social media requires integration. Integrated social media means that each of the teams are speaking to each other. Social media isn’t just an outbound communications platform for one team versus another. They should all be working together to use social media holistically, so a social media idea should be supported by PR. It should be making the customer service team aware that their levels of interaction might increase. It should be looking at the marketing team and seeing how social media is being used within their own actual marketing communications.

**Structures**

In terms of structures, let’s go from the smallest to the largest organizations.

**Flat**

The smallest organizations are where we’re going to have a simple flat structure, and this is the best place to start. This is finding one or two people who are really passionate about social media, who are going to manage everything.
Now, it’s important for you to identify when this is useful and when it needs to grow. And, as we’ll go through the different stages, you’ll see how the teams can grow.

**Tiered**

The second of these is a tiered structure. If you see from the previous one, we had one or two people. This is when you would start to see larger requirements. This is when, what would happen is, your community management, so your day-to-day interactions start to grow, so you now need to break away someone who is responsible for the team, making sure that the right content is going out, that we’re looking to the future, but that also the day-to-day services are being met.

That’s why we now introduce a social media manager, and then community managers. It can be one or two community managers, but the reason it’s important to be tiered is so that you’re starting to introduce a hierarchy in the team so that one person is actually guiding the team, is responsible for making decisions, and that somebody else is responsible for activating those decisions with their manager. The reason that’s important is because if you keep it flat too long, what happens is you can create conflict in the team because you have multiple managers, then it’s important to have a very structured team.

**Functional**

This is for the largest organizations, and it’s very effective. This is when you’ve gotten to a size, or you’re an organization where there are hundreds of employees or thousands of employees, and there’s a marketing department of 15-plus people.

When you start to use social media, that’s when you start to actually start to branch out. This is where you would have a head of social media. Within this then, you would have different pillars of the business.

- **Community:** You might have managers who fulfill more than one of these pillars, but let’s say, for the largest organizations, they would have departments within their social media, community department, a manager of that department, and community managers who are operating the day-to-day interaction.

- **Content:** You would have a content team. You would have within this content team an editor and a copywriter. Copywriters are writing the post and the tweet content, editors are more responsible for making sure that the copy is staying within what it should be, and that also they’re focusing on writing the longer form pieces of content, like blogs.

- **Advertising:** The third pillar within this is advertising, and advertising should be led by an ads manager and ads optimization. The ads manager sets the budgets, sets the ads up, makes sure that they’re running fine. And then an ads optimization expert is someone who, day-to-day, their responsibility is to make sure that ads that are underperforming are addressed in terms of seeing if the copy needs to change, or removing them, looking at our objectives, and making sure day-to-day, they’re living in Excel, they’re looking at numbers, and they’re making sure that everything is functioning perfectly.

- **Analytics:** Finally is an analytics team, and that’s where the learn part comes in, and that consistency to learn when you get to that size is very important because you need to consistently evolve, and we do that through our analytics. So, this is having somebody dedicated to social listening, constantly listening out to the consumer online, making sure that we’re addressing any negative sentiment or we’re addressing any learnings that we can have, and then finding somebody responsible for reporting, constantly looking at our performance week-by-week, “How can we be improving it? What needs to change?” And
making sure, as well, that the other departments within the organization are actually kept in the loop.

So, it's making sure that this team feeds into marketing, PR, customer service, product, and insight, and make sure that social media isn't just an outbound communications tool, but also has inbound value in actually making products better, learning from our consumer, having positive sentiment through customer service, making sure that PR are able to utilize social media as a channel for success, and making sure, overall, as a marketing channel, that we're using it to actually sell our products and services.

**Key ownership questions**

So, ownership is really important, but one of the biggest challenges that we face is actually deciding who should own social media within the organization.

When social media first arrived, it was kind of a bit of a land grab. And what happened was you had, a customer service team would grab onto social media, then you had a PR team that had social media, you didn’t have a designated social media team because it wasn’t a large enough channel. Now that it is a large enough channel, it’s important to actually negate any future conflicts by designing social media teams.

Making it a department within your organization will actually limit this. It'll also make it more proactive, more efficient, because other teams that have other responsibilities won't get lost in the social media space. They will focus on what they know, and they will get in touch with their social media experts within their business to make sure that they're working correctly together, so that every team should be allowed to contribute to this process. It should, again, be an evolving process, and it's only when all of these teams actually link in with each other that it becomes a really effective process.
LESSON 2: CONDUCTING SOCIAL STRATEGY RESEARCH
What is a research map?

These all sound like fancy terms for something, but in reality, this is the scribbles that you’re going to continue to do in your notebook.

A research map is about putting the audience at the center of the page, and starting to discover things about them, and creating the findings that you have to build your insight around your audience. What happens with research is, when we work in organizations, we become a little bit cocky, and we think we know our customer inside out, that we know exactly what they want and exactly what they need.

But remember that your consumer is changing every day, and there are new tools, new processes, new channels, and new everything. Every day for them is changing, so you need to constantly learn more about them. And this is an important step in putting aside your own knowledge of them, making sure that you know what you think you know, and actually confirming it. Prove that it’s right.

What is owned research?

Owned research is the most basic form of research. It’s the things that you have direct access to. So this is information that you can access because you own the information.

Social channel insights

You can look at your existing social channels and pull out information about your impressions and your engaged audience. Who are they? What age are they? How many of them are consuming your content on mobile versus on desktop, and what times of the day? These are all really important things to start to note down, because they’ll start to actually inform a picture of who your audience are.

Current customer research

This is important because what we have in our current research is the ability to actually know what we have in more detail around our consumer. This is for brands that would carry out research quite regularly, so they’d be able to understand how and how likely are people to recommend us? And are they enjoying competitions? Are people interested in health? What are the things that they associate with our brand?

So these are important because they’re actually going to start to give you more detailed understanding of your audience. It’s important that if you are a business that do use this type of research, that you actually do it more regularly, and that you start to actually include social media questions into your research. So, actually asking specific questions around what do you use? What platforms are you using? Because what’s very interesting is, you can start to see the next big channel start to come out, because they’ll cross two rounds of research. You might see Instagram go from 25% to 40%, and that’s important, to identify that.

Website analytics
This is massively valuable. It is the traffic on your website. Look at what happens in the social media section of your web analytics. When a social media visitor comes to your website, what pages do they go to? How long are they spending on pages? What are the top pages? If you know that, then you straight away know answers to questions like, what product is most likely to get engagement on social media? Well, if they’re going from social media to that product page, then you know actually that that product is going to be a strong product for social media. You can create advantages for that product, and deliver it in much more detail to actually see how that performs.

**ACCESED RESEARCH**

**What is accessed research?**

Accessed research is something that larger organizations sometimes have. It can be an advantage to being in a large organization because there are a lot of times they’re premium services. You have to pay for them!

So there is ANA, and there’s Warc. There are millions of case studies, research reports, and statistics. And even if you don’t have the paid work products, you can actually go in, and still read their articles. They do quite a lot of research that they release in article format. If you are in a secondary or third level education, and you have email addresses that are linked to your school, sometimes Warc will actually offer it as a free service, so do go on to the website, and find out if your college or university is listed.

**DESK RESEARCH**

**What is desk research?**

Desk research is the freest form of research you’re ever going to have. This is where you get clever with Googling. It is about searching for keywords online to do with your challenge, to do with your audience, and reading about them, and finding out more about them.

- **Check sources:** You want to be finding articles about them on Forbes, or Mashable. And you want to be finding it on reputable blogs and the IPA. Don't fall into a trap where you read an article that has no sources. It could be written on somebody’s random blog, and it’s their random opinion. That doesn't mean that it’s actually based on fact, so you need to actually check whether there are sources listed.

- **Check dates:** How recent was it? Was it three years ago or was it three months ago? If it was three years ago, does the audience still think that way? Try not to use statistics that are too old because the statistics in social media change so rapidly.

- **Check sample size:** How large is the sample that they’re using if it’s audience research? What can be very confusing is when they make statements about their audiences, but when you actually find out that this is based on a sample of 50 people. What if your audience is 6 million people, 20 million people, 30 million people? Is that a really a valuable enough sample?

- **Check origin:** If you’re international or if you’re based in other countries, make sure that they’re not using specific insights and specific audience research about your audience but it’s in a different country. That can be very important because, for example, often people assume that the statistics of a UK audience would apply to Ireland, when actually they’re very different.
AUDIENCE RESEARCH

**Type of audience research**

Audience research will uncover very specific traits, and behaviors, and insights, and understandings of your audience. So what you want to try and uncover here are things like their age, their gender, their specific behaviors. What are they interested in? And there’s a number of tools that you can use that are actually free, that you don’t have to go in and pay for expensive tools to actually uncover this.

**Facebook Audience Insights tool**

The Facebook Audience Insights tool is available in the ads dashboard. It is the raw data of over one and a half billion people that you can actually manipulate and look at. What percentage are a specific age? You can check what interests them, and whether they use mobile versus desktop. How many ads do they click on per month? How many likes, comments, and shares? And you can actually see that based against the Facebook average.

So you can actually see how much more some specific audience indexes click on ads or likes or comments than another. Very effective tool as well for seeing location and device. On your research map, jot down little things, 60% of this audience are female, 40% live in the U.S, 30% who live in the U.S speak Spanish. Start to uncover specific insights and understandings into the audience, and list their interests. And what’s really interesting in the interest section is you can try and identify what types of pages they’re engaging with. Is it short-form video pages? Is it snappy pages, like the LAD Bible? Or is it pages that involve funny memes? Is it sports? Is it home interest? Is it DIY? You’ll start to actually learn quite a lot about your audience, which will actually help you define your content.

**Twitter Audience Insights platform**

This is not as developed, and you can currently only look at a global audience unless you’re in the U.S, and then you can go more specific. But as they begin to roll this out, you should be able to look at this for specific audiences and in specific regions. What this will give you is even more detail in their mobile carrier, and their interactions with specific topics. Again, start to note what are the differences between one platform versus another? What are the demographics of your audience? What are their interests? How are they behaving? Is it mobile, is a desktop? Are they exposed to ads? That kind of understanding is invaluable.

**Google Keyword Planner**

Google is a vast resource for what people are asking the Internet on a daily basis. The AdWord planning tool allows you to put in keywords surrounding your business, and what will come up are related keywords or related queries. So, if you’re selling a specific type of product, if you put that type of product in, it will start to spit out. What are the questions people ask when they’re looking at that product? And so, for example, say you’re selling TVs, and you put in UHD TV, so the Ultra-High Definition, and you see that the number one question is, what is UHD? You know straight away that your content now needs to start to debunk what UHD means. Why is it better? Why should you go UHD? Is there anything you need to know before you purchase UHD? That's asked to inform your content, gives you an insight into your audience, and tells you exactly what you need to deliver to them.
Audience personas

Personas are so valuable because it starts to give people a visual sense about their customers. They involve writing paragraphs that describe the type of person but turns them into a character. So for example, this is Bill. Bill is 32 years old and lives in the city. He’s an accountant. Bill lives in a rented apartment with his girlfriend. They have no children. Bill likes sports, mainly football. Facebook helps him keep up with his favorite players. Bill has plenty of discretionary income, so he likes to attend games when he can.

What does that tell me straight away? What would be interesting for my social media content is a sports sponsorship. Do we have a sports sponsorship? How can we use it through social media to reach Bill? So the audience persona is a clever tool for creating this story, and it allows you to kind of really easily put you and your team in the shoes of this person.

And that’s really what we as marketers need to do, is we need to start to actually think and act like the people we’re trying to target, because sometimes what we do is we act like marketers, and we tell people what we think they need to like and do, and then reality, they just won’t do.

COMPETITOR RESEARCH

Identifying the competitive landscape

It’s very important here not to copy and follow your competitors. You might have to, in some respects, but what’s really important here is actually starting to identify, what are your competitors doing? And how can we do things better than them?

- **Channels**: Look at what channels are available in terms of your competitor landscape. Who’s using what?
- **Channel size**: How large are the channels? How many likes, how many followers? Do each of the channels have where it’s available?
- **Channel gaps**: Start to identify what channels are being under-utilized by specific competitors.
- **Content assessment**: Start to think, “What is their strategy? Okay. Well, they’re using a lot of female content. Okay, we’re, there, they’re going after the female market. They’re using a lot of content that’s based on DIY in gardening. Okay. Well, that’s an audience that they’re going after. What are you actually learning from your competitors? Are your competitors trying to reach the audience with things that actually you know they’re missing the mark with?”
- **Format assessment**: What formats are they using? Are they just using images? Could they be using link embeds? Are your competitors using dynamic content, video, Instant Experiences (Canvas), or 360 video? Are they being clever or not about using those different types of opportunities?
- **Gap analysis**: Gap analysis is purely looking at, “Well, where are the gaps?” Look at the competitor landscape in terms of actually building a little graph with the numbers of the competitors, how many people they have on the channels. And really quickly what you’ll do, is you’ll identify the gaps.

Questions to ask

For example, you might discover that all of your competitors are all over Facebook and Twitter. But maybe the competitors that seem to have the largest following are actually starting to move into Instagram. Perhaps none of your competitors are using Snapchat. Why is that happening? Should
they be channels that that you focus on straight away? Check out their channels, is it good content? Is it engaging? Is it actually getting a response? That tells you something, that tells you that maybe that’s where you copy their channel structure.

Look at the lead platforms. Why is it their lead platform? Ask yourself these questions. If Instagram is their lead platform, is it because the audience are actually there, and that’s where your target audience could be? Because sometimes what we do is we instantly say that the biggest focus is Facebook and Twitter because they’re the largest. But if you’re a small organization, the numbers of who you need to reach are a lot smaller, you can actually achieve that in other channels. Where are your competitors focusing their efforts? And is the competition previously as strong as you thought? Can you reach your competitors in a year, in two years, in three years?

Sometimes, when you look at the competitor landscape, you realize that you’ve been giving them too much credit, when actually you can definitely do better than them very quickly. And again, identify who your leader is. What channels are not being utilized? Is Snapchat an opportunity or is it actually a dead opportunity, and that if you go there, it’s not going to actually work? Are they all using the relevant channels, and what is the relevant channel mix for this audience? So again, start to think in terms of, what content is the audience more predominantly exposed to?

**Competitor matrix**

Build a graph. Start with a list of static images, videos, blogs, site links, sales messages, or brand messages. Rank from one to five how often each of our competitors are using the specific formats. What this will actually start to do, is this will start to A, show you where there is the focus of formats. But what it will also do is start to actually tell you where the gaps are. Is there a heavy sales message within our industry? Or is there a heavy brand message? If it’s a heavy sales message, then maybe you have the opportunity to come in as the brands that doesn’t just shove down your throat and try and sell things to you, but tries to sell things through loyalty, through retention, and through engagement. Or is it a heavy brand environment? Have all of your competitors overlooked the fact that social media could actually be a sales tool? If it can be a sales tool, then there’s an opportunity to direct sales messages to the consumer who’s never really received them before.

A competitor matrix is essentially a simple X and a Y-axis. They enable us to identify what those axes actually mean to us. You might have two axes, one of investment and one of quality of content. You’re trying to determine how much money is being invested, and the quality of the content. And then you rank all of our competitors between 1 and 10.

So very quickly, what you’ll start to actually identify, is where all of your competitors are operating. Are they underinvesting, and have poor content? Or are they overinvesting and have great content? Where is the sweet spot? Where is our opportunity? You want to distance ourselves from the pack. You want to put yourself into a space where we can operate, be successful, and continue to grow.

**SOCIAL LISTENING**

What is social listening?

Social listening can be challenging because you can do this through paid tools. You do this through observation. This involves going on Twitter or going on to Google, and actually searching for your keywords, and identifying roughly how regularly they’re being used, and what are the types of ways they’re being used.
Keywords

So, what are those common keywords? Why are they being used to discuss your brand, your product, or your service? So we can actually confirm that the keywords that we want to use in a campaign are actually being used by the consumer. And that’s very important because sometimes we talk about products in a way that actually the consumer doesn’t talk about them. You want to start to slowly kind of speak like your consumer so that they feel like you’re approachable. And are there additional keywords that consumers are using that you haven’t yet considered?

Others things to consider

Are there hashtags that they’re using to talk about the specific products or services that you offer? Can you identify trends in the subject matter that, and how they’re talking? What’s the language that they’re using? And with those hashtags, if you’re an international brand, are there things that one country uses versus another? You need to actually understand the different kind of colloquialisms between the different channels in the different nationalities.

And then, can you gain any customer insights from the challenges that they’re experiencing? What you can learn a lot from is how your consumer is having a conversation with your competitors, because you can see how your competitor is dealing with, you can see what the challenges are, but what you’ll really learn from is how they engage with you. If somebody has a problem, that’s a problem, you fix it. If ten people have the same problem, you need to then address it. What is the way to address it, and how actually can you use social listening to learn from that?

Tools

So what we’re going to look at now is some of the tools that are available for social listening. The best and the free one is observation, using your own eyes, using your own keywords. But in addition to that, you can use paid resources. There’s Radian6, there’s Crimson Hexagon, Tagboard, and Hootsuite, which is a free resource that you can use, but there are paid elements to it. Social Mention is another. If you are willing to invest in the use of social listening, Brandwatch is good for the large organizations. It is one of the social listening tools with a wizard. So you put in one keyword, it’ll start to learn what are the keywords around it. You put in your brand name, and it’ll start to learn what are the keywords being used around your brand. You can very quickly build what are called topic profiles and actually have results very fast where some of them you can’t go into historical data and you need to build the keywords very individually with coding language, which can be a challenge.

THE BRIEF

Collating your information

So the next section is a brief. The brief is probably the most important document for you whether you work in the smallest of organizations, or the largest of organizations.

There’s a couple of reasons for this:

ﾟ A brief is a collection of every single thing that you started to learn, all your understandings, your insight and everything.
ﾟ It’s also something that you can present in front of a superior. They know exactly what you’re about to do, how you’re about to work, what you expect to do, and they sign off on it. So when you come back with something that adheres to this brief, they can’t argue with it.
So a brief should contain 11 key pieces of information.

- **The name of the project**: What is it called?
- **The consumer goal**: What do you actually want the consumers to do as a part of this strategy? Is it to engage with you more? Is it to be more conversational about your brand? What are the things you want them to do?
- **Activity goal**: What do we want to do? We want to increase positive sentiment. We want to increase more awareness, and we want our customers to love us.
- **Target audience understanding**: Start writing your persona. Start to write a paragraph that starts to tell a story of who the customer is. What do you know about them? What are their interests, their behaviors, and any stats that you might have from your research or from your demographic studies? What can you tell us that gives us more detail about this person?
- **Insight**: This can be tough to come to, but what’s the one key thing that you learned that opened your eyes to your consumer? And this can be a simple sentence, or it can be a paragraph. But what’s the thing that you learned that you know is the area that you need to focus on the most? So if you found out that Bailey is interested in sports, then your key insight is that through sports content, we can reach our audience with new products and services. So just try and keep the language in it as simple and as easy to understand as possible.
- **What do people currently think?** This is important because in order to get people to how we want them to think, we first need to understand where they’re at. So it’s important to ask yourself, “Okay, what do they currently they think about our business? Do they think you’re boring? Do they think you’re slow? Do they think that you respond negatively? Do they just not know about you?”
- **What do we want them to think?** Do we want them to love us? Do we want them to feel like we’re a brand that understands social? Do we want them to think that we’re innovative? What are the different things and how do you want to shift from one side to the other?
- **Brand personality**: Try to sum this up in two to three keywords. Are you caring, knowledgeable, inspiring, aspirational, or innovative? What are the things, the keywords that if you did customer research and I asked you, “What are the five words that come to mind when you think of a brand name?” What are those words that you want them to actually say back to you?
- **Evaluation**: What actually are the measures of success? So your key success outcome. What’s that one thing that you wish will happen if you do this? Is it better sentiment levels? Is it higher engagement? Is it higher sales if you can track it?
- **Current story**: We need to understand what’s the current narrative that exists in the business? So that could be what’s the current campaign or the current platform that’s being offered on TV.
- **Mandatory**: Is there anything that’s absolutely expected from this brief? So what does your boss expect? He wants video. Then video has to be within the response. Do they want experiential? Well, experiential has to be within our responses and how we operate on social media. You need to understand what are the mandatories of things that we might have to do within this strategy that we clearly need to address.
LESSON 3: SETTING OBJECTIVES AND SOCIAL KPIS
What does success look like?

It's important at the very start to actually understand what success really is to you. It is a number of KPIs that will become a marker for success. So you should be creating a rough list of all the possible success outcomes that you have that are listed in your brief, and then using the SMART system that we've all learned from a very young age to identify the list of potential goals that are going to be within your key success outcomes.

**Specific:** Is the goal clear and singular? So really try to avoid, “I want more site traffic and more sentiment and more video views.” Try to be more singular. Try to figure out exactly what it is you want to achieve.

**Measurable:** How are you collecting data that can actually be used to measure this? If you say, “Well, it’s about sales,” and then you don’t sell online or there’s no way to track the influence of social as a sale, well, then it’s into measurable. You can’t do it.

**Achievable:** Can you actually do it? You know, be really hard on yourself here because sometimes we set our goals too high and then actually we get knocked back quite a lot and then it can really be difficult to get social media further down the line to actually be used because your superiors or the organization hasn’t got as much trust in it.

**Realistic:** Is it something your business can actually achieve? Try to ignore people that say, “Our goal is to go viral.” That is never the goal because it’s not realistic. You cannot guarantee it. There’s no way to make sure that it happens. A lot of that has to do with circumstance and luck.

**Timely:** Can you achieve results within the timeframe that you’ve allocated?

So within this, there are three kind of levels of success.

**Low level:** This is where your subordinates should be having low level success measures and success outcomes. This should be measured in monthly or weekly results that you want to have within your team.

**Mid level:** There’s the mid-level goals for yourself. These are the things that you need to achieve within your own review period. So don’t forget that, like, if management perceives something as being important, then that’s your goal. That’s what you want to achieve because it’s part of your job. You might know that there’s another identifiable goal that they should be adhering to, but if they don’t agree to it, you should find what medium between what they want and what you want that becomes your goal.

**High level:** These are the things that you cannot measure monthly or weekly or sometimes even quarterly. These are the things that you’re going to bring to management that are going to get your social media budget doubled and tripled within the next five years. These are the things that you will bring them annually or even half yearly that tell them exactly how you’re performing. The reason that it’s important that your management receive the high-level annually or half yearly is because if they’re jumping in weekly or monthly, they’re never going to be happy. They’re never going to see the movement that they want to see. They’ll always expect more. Half year or annually, you’re going in with numbers that are going from point A to point B substantially. And that’s important because then it is easier to sell in the different things that you require as a result of this.
KEY PERFORMANCE INDICATORS

What are KPIs?

Key performance indicators (KPI) are more specifically the individual metrics that we use to combine to actually report back our key success outcome.

So in terms of KPIs, we have:

- Sales
- Site visits
- Engagement levels
- Sentiment
- Hashtag usage
- Video views
- Leads
- Response time
- Video retention
- Community size
- Mentions
- Response rate

It's important to identify what are the ones that are important to you because, collectively, you can use these to prove the existence of your key success outcome. So, for example, you might have high positive sentiment. You also might have high video views and high retention, and as a result, high site visits. It's important to understand the relationship between your KPIs driving towards your specific outcome. Because a key success outcome is awareness, you might use hashtag usage, volume of impressions, volume of reach, and you can show that, “Well, okay, we're reaching a lot of people and in turn, they're actually talking about us, so our awareness levels are high.”

Most common KPIs

Within this, there are the most common KPIs that we need to adhere to.

Engagement

Within engagement, how many users that you're reaching with your content are actually choosing to engage back with you, to actually, you know, initiate a response? That response doesn't have to be a comment. That response could be comments or shares. Avoid likes on Twitter and Facebook. Likes are more valuable on Instagram, but on some of the older platforms, it's a very passive action. What you do want to see are shares, and you want to see comments.

And then within the comment section, the real goal that you want to get is friends tagging. So when somebody in a comment section, or when they read Twitter, retweet, or in the Instagram comment, when they actually tag one of their friends’ handles, that’s really what you want because that’s telling you the person that you reached felt so strongly about the content that they received that they chose to actually tell a friend about it. And that’s a really strong thing to have as a key success outcome, is actually that advocacy.

Content

How is your content being received? And it’s closely linked to the engagement performance. The likes and the comments and the shares are actually making people go to your website. Further to that, if you carry out research, are individual customers actually recalling specific pieces of content, especially the bigger pieces that you do. If you’re going to do a large campaign involving kind of social media only video, it is important that you do address this research to see actually did it resonate with them. What did they feel when they actually saw? Are they more likely to recommend to family and friends?
A recent campaign last Christmas that was done with the airline Aer Lingus, it brought six people home as a surprise for their families from all over the world and then it gave them GoPros, and they videoed it. But post campaign, it ran research that proved that it had an X percentage increase in how likely someone was to recommend it to family or friends and how more likely they were to use Aer Lingus again. They’re invaluable to know that when you do pieces of content like this that they actually will result in a business result. They will actually make people tell their friends to use the brand more often.

Conversions

Are you converting users? If you're able to track the ability, to track from content through to sale, or from content through to conversion of, let’s say, a lead form, what actually is causing that? How is that content causing that and is it actually impacting the business, not necessarily in sales but in sales and leads?

How is the content being consumed? So for example videos, for a long time, people just focused on video views. “How many views am I getting? Oh, 3 million views. Fantastic.” But actually, on average, of 3 million people, those 3 million people on average watch the video five seconds and it’s three minutes long. That is not a strong performance. What you want to see is retention of that video. What percentage of the video? You can use YouTube and Facebook to do this, and Twitter will actually give you percentage like quartile. So like 25%, 50%, 75%. It’s important to look at are they getting the message. What is positive retention? So you can use that to actually understand their consumers.

Conversations

Another one and a really strong one that’s being used at the moment is Facebook reactions. So actually, are people using emotions to react to your content? If they are, why are they? If, you know, one piece of content just gets likes and then another piece of content gets a love or a ha-ha or a wow, why are they doing that? Because if you’re causing consumers to go that extra mile to actually engage in a different way, then it’s working. You’re doing something.

From KPIs to KSOs

The formula for this is you need to identify the KPIs that are related to your specific KSO. So is it, “Okay, our first KPI is that our videos, most receive in excess of 50% retention because our message happens in the 8th second of a 20 second ad.” That tells me straight away that if our users on average watch over 50%, they’re on average getting our message. The second of these is the view. So we know if we just get 10 people to get a video retention of over 50% that's not really that positive. So what is the video view KPI? What do we want to hit? Do we want 10,000 views? Do we want a million views? Do we want a million views? What, actually, do we need to achieve?

And then finally to that is relating hashtag usage. “Okay, so we’ve got them to see it, we’ve got them to consume the message and actually, as a result of that, we’re also seeing people actually talk about our brand and using conversation to actually talk about them.” So that’s a real clear ability to say that there’s positive brand sentiment and people are speaking positively about us, they’re consuming our content, and choosing to consume our content in a much more positive way.

So that’s definitely one way to build your KSOs is to try and develop it from multiple KPIs and I promise you, the KSOs are going to be more valuable to your superiors because they’ll be able to understand them more clearly. KPIs are just numbers in the air. And unless you can actually equate
them to a performance within the business, then they hold no value. A KSO is something that is the success outcome. It’s what we know is a performance that we can identify clearly within the business that’s positive.

MEASUREMENT

What data is valuable?

We’ve all heard of the term big data and unfortunately with big data comes big challenges because there’s so much data available to us. Now, what can happen is we can start to drown in data.

We need to consider every data point that exists for us on social, on our website. Are you tracking footfall, and what numbers do we have around our business that potentially social media could influence?

Outline every data point that’s even remotely connected to social media activity in the sense of what way it’s connected. So does putting an offer on Facebook drive footfall?

Social return on investment

So understand where they’re going to be related. And because what we’ve talked about already is this idea that return on investment is not a simple equation. It doesn’t always mean that it is a dollar sign or a euro symbol. It sometimes means that the return is the action that we create on social media that influences the sale. Social return on investment is developing actions that you can understand have a relationship between the sale. Eventually, we will build models and over time, we will construct very expensive models to understand the specific return on investment. But for businesses, for small to medium enterprise and for small business, it’s about the action. Drive the action that you know has a positive impact on your business.

Data maps

A data map is essentially a ranking system. Each channel is allocated all the different data points that are available, and what you do is you start to rank them. So you pick between one to five, one being least important to five being most important, what way you actually rank them. And when you start to rank them, you will start to actually identify what are the clear winners in terms of what are the ones you know are important to your success. You straightaway know that these are going to be the things that you’re going to feature on your dashboard.

Data dashboard

A dashboard is all of the data points that you’ve identified are important, all placed in one specific place. This can be more complex. This can be built as a website using data draws from the different websites using the API. However, for most brands, this is simply a set of slides that you have put information on that is connected to either an Excel or you’re building the Excel every week and you’re taking the different graphs out of it and placing it.

The reason we use graphs is so that you can see the trend, then it’s to use single numbers that actually focus on the given number for that specific time period. And then actually what you can go one step further is making the number green or red or black, black being it hasn’t changed, red meaning it went down, green meaning it went up. And then actually identifying in your notes what quantities they went up and down, because that will start to tell you what’s happening, what’s
changing within these metrics. And actually, you can make decisions and actually change things based on how you can respond to changing the performance.

**Primary data and secondary data**

**Primary data**

Primary data, which is the things that we've ranked the highest and our secondary data. So primary data is something that you know that you can relate directly to the performance of the business. The primary data are those KPIs that are part of your KSO formula.

**Secondary data**

Secondary data is the ability to use data that is combined, that influences the primary data point. So the positive sentiment being your primary data point, that's your KSO. Then the secondary data is the KPIs that you use over time to influence your primary data which is your sentiment measure.

**Keeping measurement clean**

On the measurement dashboard that you start to build, it’s very important that you use the ones that can be brought back to business results. And again, use graphs. Because this avoids this idea of single numbers in isolation and you’re just comparing numbers against numbers and they don’t mean anything. You need to see graphs going up, if they’re relevant, to be going up. Or you need to see them going down if you need to reduce figures. But it is important to identify whether social could be assumed to have an influence on performance.

So over time, this will enable you to understand what your social ROI is. And this is really the scale that’s developed over time is knowing what numbers are going green and red, and why, and what quantity of having a number of numbers green means that it is a positive impact on ROI. This is your return.

You can’t yet say that it’s a dollar or euro sign, but you can say to yourself, “Okay, well, I have eight figures on my dashboard. When they’re all green, we’re operating positively and we’re having a positive impact on business performance. If half of them are in red and reducing and reducing consistently, then we know that there’s something we need to change and how we fix that.”

**ACCOUNTABILITY**

**Sharing responsibility**

Accountability is important because you have to share responsibility within the team. And the reason this is important is because social media moves so fast that very quickly, when you’ve set out things to do, things can change, performances can change. And if you’re not tracking performance and somebody is not accountable consistently enough, then you won’t be able to identify changes in performance and capitalize on them or alter negative performance.

> **Who identifies the patterns of your success?** That’s probably the leader of a team. Who identifies what success is, and what the patterns of it is?

> **Who tracks performance?** Somebody tracks performance.
**Who will make decisions for change?** Somebody identifies something that needs to be changed. Who is that one person that they have to go to get sign off to actually implement change?

**Who’s responsible for that day-to-day performance?** So you need to understand, you know, what are they responsible for? What are the individual team members’ KPIs? How are they going to be measured in terms of success? Like, what does success look like for them?

**What are their daily and their weekly goals?** They need to understand that if they don’t get clear direction as to what you want, they’re just going to be churning numbers and performance for the sake of it.

### Departmental accountability

Everything has to be driven by our guiding metrics that we’ve already talked about because within specific departments, there needs to be departmental accountability because each one has to actually have their own kind of KSOs and KPIs for their own work.

### Marketing

Within a marketing team, they’re going to be focused on sales awareness. Something that gets overlooked is winning awards. Brands that win awards get recognized and actually, that can improve your own image within the industry, and driving that engagement with your customer as well can improve your image within the industry. So just remember that there are things that people are accountable for.

### Product

They’re responsible for sales, but they also might be responsible for the click-through rate. So are we delivering products that are creating engagement? Do we need to alter our products for our social media audience? It’s a very controversial thing to say that a business might actually have to change a product to suit a social media audience. But if you are dealing with an audience that is millions of people, they are their own sample. So if they’re telling you things about your product, you should be listening.

And consider conversions. Are we selling enough through social and why, and why aren’t we? And developing insight. That team, the product team responsible for coming to social media team, getting insight about how the product is being talked about. How is the service? How are we being engaged with? And what can they take from it?

### Customer service

Within customer service, it’s sentiment, response time, and response rate. Are we responding to people quickly? Are we responding to everyone? Really simple things, but very important.

### PR

And then through PR it’s when we do specific stories or specific activity that we are driving those impressions, that we are getting that reach and that is resulting in positive sentiment.
Setting realistic timelines

Reviews are such an important part of the strategic process. So really before you begin to build your strategy, it’s important to kind of review all your timelines so that they’re set in stone with teams. Put reviews in the calendar so that everybody kind of clearly knows throughout the year, what way they’re being measured, when they’re going to be reviewed, and actually that everything is guided by very specific phases and very specific kind of stages within the campaign.

So within our kind of consistent measurement, we can identify performance levels and make decisions on them. So under-performing content and tactics can be addressed, leading to a decision to improve content or at times even scrap activity that we know is not working. So it’s important to capitalize on the strengths as much as the weaknesses and oftentimes, the focus is on improving under-performance as opposed to capitalizing on the strong performance.

So strong performance can give us that clear insight into how people are engaging with us, how can we build on it, how can we make it stronger and can we optimize through increasing our media and creating more content, or actually improving our own processes?

A phasing plan is your ability to design your strategy within very clear phases of what stage you’re going to be in with your customer. So if it’s straightaway brand new, it’s creating it, then it’s reaching people, and then it’s engaging with them. If it already exists, it’s changing mindsets, reaching them, creating positive. So it’s all about building it around it, but it’s building it through time.

So identifying the months. Then within this, it’s actually giving you lists of, “Okay, well, our always on content is always on. Okay, we’re going to have a campaign in February and March, so we need to identify that. We’re going to have another campaign in August. We have a sale that’s going to go live in January to coincide with a campaign. And then we’re going to have a Christmas campaign.

And here are the different budgets that we have for each quarter or actually for each phase. Because it is so important to give your strategies room to breathe. So this strategy that you build might last three years, but each year is its own phase. Or within each year, there are its own phases. So it’s important to try and actually build along the process of the three year or the five year, what ways you expect people to change? What way do you expect to scale and how will you do that?
LESSON 4: BUILDING A SOCIAL STRATEGY
Establishing your overarching strategy

The idea behind an overarching strategy is that it’s a *key phrase* that identifies – regardless of any platform, or where you put it, or what it is, or how much money you spend on it – exactly what your purpose and what is going to achieve that KSO.

So it should be simple, it should be clear, and it should be something that everybody understands without having to be educated on it.

**Example**

We might say that our strategy is:

- To create a community of passionate brand advocates through inspirational storytelling.

That tells you very simply:

- We want to build a social community.
- We need to build it around brand advocates, so we want people who have an interest very specifically in our product so that they would tell other people about it.
- We’ll do inspirational storytelling. So we know that inspirational storytelling has to be communicated to very specific things. Inspirational storytelling is through long-form blogs, videos, things that are exciting.

So that clearly tells me what I need to know about it and how I’m going to implement it.

Another example might be to communicate with customers in unique and different ways that change perceptions of the brand. Straight away that tells me that my customer service team need to be the best customer service team in the industry. They need to do things uniquely, they need to address things differently, and they need to be exciting, and something that, you know, jars probably with the industry.

**Insight**

The next thing in the strategy development is that we need to understand what an insight is. So we need to uncover what we know about the audience. What is the most interesting thing that you learned about that audience? What compels in certain audience behaviors and what makes me do things? And then what is the relationship of this behavior to your objectives?

An insight needs to be a clear understanding of your audience that actually gives you that understanding of what exactly you’re going to need to do for them.

**Example**

So, for example, before when we talk about the strategy being to create brand advocates, we might know that through our audience that actually what they respond really well to is influencers. So we might say that the insight here is that, through persona and identify personalities, we will reach our audience. So let's look at some of these insights. So what are the learnings that we have to develop the core insights? And let's look at some of them.
Our audience expect to be engaged through video. Video content that is consumed creates a positive experience. Videos that are compelling create conversion. Our competitors are focusing on constant sales messages.

So we looked at this. This is in our research map. These are all the findings we have.

So we might say:

Through compelling and emotive storytelling we will engage our audience to create positive sentiment for our brand.

This clearly kind of identifies the insight. And that insight is that, right, we need to be compelling, we need to use emotion, we need to tell stories. And if we do this, it will create a positive conversation.

**Creative platform**

So the next step is something that’s probably new to you, is this idea of a creative platform. So the idea is that the creative platform should be developed from the insight and the strategy. So this idea that, and we’ve said that through compelling and a mode of storytelling, we’ll engage our audience to create positive sentiment for our brand. What is that representation that we’re going to put to the consumer?

You can express this as #creativeplatform. When developing this creative platform, you should think, “Okay, well, everything in social, we want to exact a response. The best response we can exact is conversation. Okay, well, if there was a hashtag that we could use to best communicate our strategy, what would it be?” And that starts the idea process behind it.

**Example**

A bank called AIB held sponsorship with the GAA in Ireland, which is the Gaelic Football Association. And their campaign is #thetoughest. They uncovered the insight was that it’s an amateur sport and at the elite levels of the sport, at a much higher level, there are many superstars who have never won this specific championship, which is the club championship. So they’ve now said that, that is the toughest. And that was the insight, the insight developed the platform. The hashtag clearly demonstrates the insight and the platform and all the ideas come out of that platform. So try to think of it as the short interpretation of your insight but use that then to develop creative.

**CONTENT STRATEGY**

**What is your content strategy?**

A content strategy actually is just a guide for how you create content. It gives it a purpose. It should be built off of your overarching strategy and it should detail your format selection and your tone and your personality. It should bridge it all, and move towards a common goal. So the number one priority for your content strategy is to produce content that’s consistently effective and builds the same behaviors with a consistent audience.

Imagine a table with 20 empty glasses and you’re filling each of those glasses with water. Now, drink it. There are 20 glasses on the table. You’ve got to do it one-by-one. It’s not effective. Each of those
glasses represents a different audience and a different approach. Now, take a jug or a bucket and start to fill the bucket. Now, it’s easier to drink from.

If you focus in on one audience, it’s more effective. You’re filling that one audience with the same behaviors, the same response, the same consistent engagement, and that means that actually what you will see is much more consistent behavior as a result of that. So an example here might be that our strategy is to create a community of passionate brand advocates through inspirational storytelling.

But our content strategy then, is to deliver our products through exciting and aspirational content that encourages our customers to share products with their peers. So it really clearly demonstrates that the content strategy is informed by the overarching strategy.

The alternative is that we communicate with customers in unique and different ways that change perceptions of the brand. The content strategy is to deliver exciting content to our social audience in ways never seen before. So straight away, that tells me, “Okay, well, my content should start to use formats that are new, different, Instant Experiences (Canvas), 360, Twitter moments, an Instagram carousel, start to actually understand that. That’s the difference that we create.”

So you have your compelling overarching strategy. Out of that you start to develop your content strategy and then we will move forward again.

Planning

So in planning content effectively, that is the next step of putting your content strategy in place. So you have your overarching strategy, you have your creative platform, and, out of that, you’ve developed your content strategy, and out of this now, what you will develop are the platforms we’re going to use, identify the timings, identify the tone, and identify the narrative.

So consistency is so crucial for content. Too often, brands kind of bounce from different stories, different narratives without keeping a consistent story. And this consistent story creates the consistent response. And the consistent response, again, builds the behavior and the perception of your brand with your audience.

[* Platforms: Now we decide platforms. Is it Facebook, Twitter, Instagram, or Snapchat? What platforms are you going to use with our content?*

[* Timings: And not just when in terms of month or week, but actually times of the days. When do we go on Facebook? When do we go in Twitter? Start to actually understand more about that.*

[* Tone: Who are we? What is our personality? Are we a friend? Are we knowledgeable? Are we inspirational? You know, what are we actually saying to you?*

[* Narrative: What is the story that we’re trying to tell? What is that creative platform and what’s the story that comes out of the creative platform?*

**Building a format plan**

**What is a format plan?**

A format plan lists out all the various formats that you’re going to aim to use with all their specifications and everything that’s required.
So if it’s a video, you’re listing out the video specs, and the video length that you want. And you’re going to list out the different lengths you want for different channels. Consider different sizes for different channels: square for Instagram, and landscape for Facebook.

Building this format plan enables you to lay out all the content for that given period. You need to then list all the copy for each piece of content that you’re going to require. This includes videos, Instant Experiences (Canvas), posts, whatever you’re doing on the different days. You need to list everything out.

**Objectives**

And you need to make sure that whilst you’re listing all these out, you are considering the objective of it. Are the KSOs being maintained here? Do you understand what the objective is? So you’re going to list out all the formats in detail, and then you’re going to understand the dimensions and the requirements, per the site requirements. So again, when laying out all the content for that time period, list all the copy for that piece of content, list all the formats in detail, and then get your dimensions and your specs ready.

What you really want to do here is you want to really remember what actually are you trying to do. What is the objective of each piece of content, site visits, video views, conversation, and engagement? And remember that you need to actually focus on making sure that your objective is actually connected to what copy and what format you’re using.

**CREATIVE PLAN**

**The role of creative planning**

This is the bit everybody loves! You’re coming up with your ideas and your campaigns and your activations. And what we do here is the same as what we do with the content except now what we’re doing is we’re looking in more detail into our ideas and activations from those ideas, what visuals we’re going to need and then, again, what narrative there is within this. We build creative messages and ideas that we’re now going to communicate through social media.

**The role the overarching strategy**

And the creative strategy should adhere to your overarching strategy, it should be informed by it and it ensures that all work is following that specific guide. It’s targeting the right audience, it’s reaching the right audience, and it’s cultivating that correct behavior and repeat behavior. Always consider your budget here. Make sure that you’re not investing too much in creative and not enough that will create not enough for your media, and making sure that you’re not creating an imbalance in that creative media ratio.

- **Ideas:** What content are you going to do as a result of your creative strategies? What is the central idea to that? Is it to create a video that tells our story, or our customer story? Or is it the ability to give away a holiday but running a huge campaign around it and then an idea of getting people to submit their own content to actually win it. These are all ideas around it. And it’s important to list all of these out and identify which ones are going to work for you.

- **Activations:** What are you going to do that actually encourages the consumer to respond to your ideas? And how will you incentivize that response. It could be a competition. Or over time as you develop a relationship with your consumer, it could be through them just using
the hashtag that you’ve built for a campaign, or just the ability that you built rapport within that they will respond naturally.

**Visuals:** What's everything going to look like? Make sure the visuals are consistent, that there's a style guide for them that makes sure that they look similar, that you're not dipping in and out of different color schemes and tones and look, because then all of a sudden your campaign or your work doesn't follow the same rules and then it doesn't look the same. That's very important in creating that repeat behavior that people start to identify commonality between everything that you're doing.

**Narrative:** Refer back to your content strategy. What's the story that we're trying to tell? Are your ideas telling that story? Are you activating them, that actually you’re also telling that story, and visually, are you also telling that story?

As a social media manager, it is important that you are managing expectations. There is this unfortunate myth that social media is free. It's not! The work that has to be done on social media requires a lot of resource, effort, and time. And it’s important that you identify what are your hopes and dreams for social media work, versus what are you actually investing in it, to make sure that you’re actually finding balance within them.

**ASSET DEVELOPMENT**

Creating your assets

Now we start to move into actually creating things. So we’re now creating assets. And what we need to do is make sure that we’re constantly referring back to our format plan because our format plan is actually telling us exactly what assets and the dimensions of what is required.

So you need to identify the channels. Which social media profiles are you active on and what ones are actually a part of this specific piece of work and what assets are actually already available to you? So is there a TV ad that’s already been shot that can be edited? Have you got stills of customers or stills of your retail store or your branch? And then the format variables are important. So can you develop creative that’s using a number of the new more dynamic formats but can you use existing creative to do it?

With Twitter moments, it’s using a number of different GIFs and images or videos into one single unit. So it’s making sure that you’re identifying where you are developing assets individually and where you are using dynamic formats to actually combine those assets to get more value out of them. So it’s really important to make sure that you have a diverse and set of assets within your format plan. Then this is where you review everyone’s work.

So if you get to the format plan and you see it’s all images and videos but you feel that GIFs are important, that’s the time to raise it. Should we have GIFs, and if we should why? So again, you’re referring back to it and you’re constantly addressing why you’re actually creating these assets.

**Ensuring efficiency**

One of the things in asset development is this idea of efficiency. So what you need to do is start at a high level version of creative.

**Create and convert**
Try and create assets that can easily be converted to suit other platforms. Create imagery and videos that can either be sized differently or cut differently so that they can be used on the different platforms.

Examples of this are shooting videos in the highest quality that you can so that it can be used on YouTube, so they can be used on Facebook, so they can be used on Twitter. Shooting that video, understanding that you might need to cut the frame to make it square or make it landscape, means that you're actually creating video content efficiently. You might need visual, you might need the slides in the landscape, but actually if there's nothing going on in them, you can cut them, which means you can use it on Instagram, you can use it in natural square or vertical formats.

And consider how imagery and GIFs can actually be captured out of your video creative. If you're doing a video shoot, make sure that you're capturing stills. Make sure that when the video is complete, that you're extracting GIFs out of specific moments of it. These can all become very valuable.

Existing assets

Make sure that you are using existing assets. If you have TV, make sure that you’re re-editing it, that you’re reusing it again so that it can be used on social. There are very effective ways to shorten TV ads to 10 or 12 seconds to create visuals on top of it that address what maybe a VO might say because most social videos consume silently, to actually make sure that it’s a very valuable piece of content. And when you’re investing a lot of money in TV ads, to make them, spending $10,000 or $15,000 extra to have them converted to social as well is massive value to a campaign.

Formats

Understanding the different kind of variants and format is quite important because this is where we start to get into complexities.

Standard formats

These are text only, very simple. You just need to write the copy. You can do it in-house or you can use an external agency.

Image

You can have standard images, so that’s just posting an image. You can have embedded images. So that’s images that are used in link embeds. The click of it goes straight through to a site. It’s to understand that image either needs to be engaging, if it’s standard or if it’s embedded, it needs to be directive. It needs to have a call-to-action on it, and it needs to be really clear at driving that traffic.

You could create a carousel, which is putting a number of images together into one format. Carousels can be one that can be used very creatively, because if you have one big long wide image, it can be coded to four pieces. And then actually as you’re swiping through the format, it feels like one big experience. And that’s what important is when you’re going to use some of these more dynamic formats, is making sure that you’re using them in clever ways.

Video
Adding video can be very costly. And in most cases, it involves using a third-party. And you can choose to use an agency, you can go straight to a production company, or you can look at hiring a freelancer. But the important thing with video is making sure that you have:

- Standard video, which is video that you just post
- Embedded video, which has call-to-action
- Channel-specific video

Standard video is creating videos and posting them.

Embedded video is videos that have a very specific call-to-action in them and are driving to site. Remember that if it’s embedded, it should be short, because you want them to go to the site. It should probably be less than six seconds. It should have punchy call-to-action, punchy moment, or punchy narrative, and then it’s straight away is encouraging them to click to the site. If you’re telling a story, you might use a longer format.

Channel-specific video involves understanding that different channels require different attention. Our attention spans are in massive decline. We’re basically goldfish. And after seven seconds, you will lose 45% of your audience. So remember that on each channel, after seven seconds, 45% of them are gone. Where is your key message? Is it upfront, is it in the middle, is it at the end.

YouTube is much more suited to longer format. Facebook is more suited to shorter, so kind of in and around the less than 40 second mark. You can go longer, as long as the message is strong enough that it’s going to retain the user. And Instagram and Twitter are fantastic for short quick snappy videos because that is an area with more hit. So Instagram launched with 15-second video. You can now upload more than that, but that doesn’t mean the user wants this. So people are used to snappy content. So don’t try and deliver long formats in the wrong channels.

**Dynamic content**

This is the formats that you have to capture either in the moment, or they have to be very specifically designed and developed. So within this you have Snapchat. There is no simple way, other than being right there and then capturing it and being creative on spot. So this is where you might use third-party, like bringing in an artist to capture photos and draw. Or you might use a photographer. Or you have a dedicated person at events and at activations from your team who’s going to use Snapchat to communicate. Same with Instagram stories.

With Instant Experiences (Canvas), it’s understanding that you need multiple formats. You need to piece them together so that they start to make sense.

And then finally you have 360. Most recently, again to go back to the GAA example, if you go onto YouTube and Google “AIB GAA 360,” it created a 360 ad to tell a story. It had multiple scenes. It shot it in ambi-sonic sound. So the sound is all around you. It had to use a third-party production company. But you can also buy a 360 camera online. It’s called the Ricoh Theta, costs about $400, and use it today. But it depends on the level of complexity that you want within the format, to how much you’re willing to invest.

**Getting content developed**

That’s where the argument of using in-house or an agency or a production company comes in. You might be willing to spent that extra bit of budget to make sure that this third-party that’s more expert.
That takes a lot of the painful stuff, which is all the phone calls, the running around, going to the shoots, can actually move that to another party, which can actually save you a lot of money. You might have to spend a little bit more money but maybe it’s preventing a hundred hours of your team’s time from being wasted on it. That’s worth money in itself.

**MEDIA PLANNING**

**Building a media plan**

A media plan is something that not a lot of brands and businesses use but they’re so important. A media plan is essentially a blueprint for how your ads are going to be bought. And it involves listing out all the different channels that you have; then within that, itemizing all the different activities, so formats, or specific moments that you have; and actually listing against that, your total spends; and then going into it more detail and listing your month-by-month costs.

1. You can start on the left-hand side, and list out the channels.
2. What percentage does each channel get in terms of budget? Allocate that.
3. List out the items.
4. Each item within each channel, what percentage do they get of the total for that specific channel? You do that for every channel.
5. And then you go across in the months. And then in the months you identify, again, using ratios, what percentage of your budget is going to go into what month and why.
6. And then you apply the percentages to the totals. Apply the percentages to the each of the line item totals.

And very quickly what you have is a very concise and very precise media plan of how everything is to be implemented. This gives your team a real clear plan of what is happening, when it’s happening, when it goes live, and when it should be reported on as well.

This gives you a document that you go to your superior with, you put it on their desk, and you say, “Here’s the budget, this is how much I need. Are you happy to sign this off?” They sign it off. It’s implemented. There are no questions. It’s important to have a paper trail with this, not because there’s a lack of trust but purely because it gives you documentation that actually supports everything you’re doing.

If anyone ever questions what you’re doing, you have two, three documents that you can take out at a moment’s notice to say, “Yeah, we’re doing this because of this reason.”
LESSON 5: EXECUTING A SOCIAL STRATEGY
CHANNEL REFINEMENT

Managing your channels effectively

Questions to ask

Within channel refinement what we're talking about is managing these channels effectively.

You need to ask some key questions:

- What we really need to understand here are:
- What roles do each of the team members have upon launch?
- Who is responsible for implementation?
- How does management differ between the channels?
- When will specific activations actually occur?
- What key activities and events will occur during specific moments?

Social WIP

You should try to implement what's called a social WIP or Work In Progress. This should be a meeting that gathers all the individuals who are responsible for the body of work that you're about to take out in place. This could be daily, it could be 15 minutes every morning, if you want, a week. It depends on each organization; it depends on how often you can meet up or even how often you should meet up.

Channel-specific management

So within this, you need to understand within the channels the specific requirements of each of them.

- **Facebook**: When you have a Facebook page there's a lot of day-to-day work there and you have to pay particular attention to comments and interactions that come in. And then during times when you're actually spending a lot of media and buying a lot of ads you have to expect that that's actually going to increase, you might actually have to move resource around.
- **Twitter**: It is very similar to Facebook in the sense that you can use it as your social listening tools, and you need to have resource for that. During the campaign when you start spend ad budget, the interactions start to increase and it puts a strain on that resource.
- **Instagram and Snapchat**: Because they're only really evolving now, they require a lot less management, because you're probably going to be posting or using them less. But it is important to still make sure that people are checking them, that they're monitoring them for complaints or any comments. And then it's actually within that kind of Snapchat or Instagram stories, that micro moment space, is making sure that if you're going to use it that you actually have simple things like the right device to actually use it, that the person actually implementing it actually knows how to use it. Really simple things, but they're important questions to ask ahead of actually implementing everything.

Format specs

So now we'll do is discuss kind of more fundamental kind of format specs that you need to really consider ahead of kind of refining into your channels.
Video

Video is not a new format, but the way we’re engaging with it is massively changing. So we’re consuming more video but less time of each video. We’re becoming goldfish; we’re consuming less of the video content. So we need to actually maintain that view. So it’s important, in addition to making it compelling, but actually looking at the results of the video.

Places like Facebook will allow you to see how many views you’re getting to 95% of the video, which can be consumed through auto-play or click-to-play, so you’ll know actually who’s consuming it.

But what’s a really interesting thing now that we need to pay a lot of attention to is this idea of auto-playing without sound. Instagram, Snapchat, Facebook and Twitter all have formats that you can initially play without sound. Now up to 95% of all video content that’s consumed on Facebook is actually consumed without sound. So if your content is talking heads, you’re getting nothing there! Consider subtitles and consider short or snap your content to make it more visual. Think about how you’re using the formats more effectively.

Micro-moments

With platforms like Snapchat and Instagram stories, this is a huge opportunity to be different. It’s a huge opportunity to reach niche audiences particularly younger audiences, but how you’re communicating through these has to be addressed in how your audience uses them. So you need to utilize emojis, you need to use fun conversation, you need to make it exciting and interesting. Don’t just take pictures of things and post them. Try and use different nuances of each of the platforms to be more effective.

So, if you plan on using multiple platforms, it’s really important to identify what the various nuances are of each of the platforms on offer. You can elaborate on existing creative strategies like capturing micro-moments utilizing carousel formats or for multiple images or utilizing formats specific to each platform. So Twitter has conversational ads, Facebook and YouTube can offer 360. It’s to make sure, identify what’s the thing that’s different about that platform, and how could you use it within your campaign. And make sure that you’re using it well.

So, for example, now when we head into the next couple of years Snapchat is going to offer the ability to buy filters. They won’t be cheap, but that’s a highly engaging, highly creative way to make your audience have an experience with your brand. You need to then apply the creative thinking to it, apply the media budget to actually securing it. But if you can do that, you definitely can use the nuance of that platform effectively.

MEDIA BUYING

Paid advertising

Paid social advertising has been one of the fastest growing digital media channels; every year it’s increasing its numbers. But what’s most important about it is that it’s also the most cost-efficient form of digital media. Now that doesn’t necessarily say that it’s cost-effective for the actual impact, but it is cost-effective for the action. If you want a video view or a click or an engagement, the cheapest place you’re going to get that is through social channels.

And every single one of them has different values on your plan and there’s different characteristics.
Facebook

Facebook works off of an objective buying bid model, so whatever it is that you want to actually achieve you can be very specific about it and Facebook will pursue that objective within your target audience. Do you want video views? They will get it. Do you want offer claims? They will get it. Site visits, site engagements. Do you want app downloads? Do you want app engagement? Do you want people to attend an invite to an event? These are all very specific objectives that you can set out in the Facebook ad buying tool.

And really with Facebook they continue to innovate and launch new formats quite regularly and they continue to iterate as well and make the formats that they have better. So it’s important to understand that it might be a channel that people say less people are using – there are still 1.2 billion of them daily.

Twitter

Twitter has started to decline. However, it still offers really interesting formats. But what you should consider Twitter for is what’s the real-time environment that you’re reaching people. Try not to think of it as a messaging platform that just messages out all day every day for a week. Think of it as what time can you put a message out and how relevant you can be to that specific time.

So it should be focused primarily on either consumption of short form content like short video of GIF, or driving conversations. Using hashtags, making your consumer actually have a conversation with you and engage with you. If you use Twitter that way, then it will be more effective. So is your audience really interested in a specific TV show, how can you engage around that, that’s relevant to your business? Do you have a sports sponsorship; can you use Twitter to engage around specific events to do with that sponsorship? So these are things to understand as places where you can integrate your social media behavior.

Instagram

Instagram is owned by Facebook, so they have massively integrated the processes of Instagram media buying into the Facebook channel. So all the objectives that listed above you can actually buy the same objectives for Instagram, because they map the audiences from Instagram to Facebook. So it’s a really interesting way to be able to use Instagram, but use the existing Facebook audiences that you’ve already built to actually target them. Basically, it should be reserved for kind of your more influential audience. Instagram is a channel where Facebook is the broader audience, Instagram is the more niche at the moment. So think of who is the brand advocate and the influencer in the target audience that you want and how can you actually reach them and compel them to actually tell your story to their own peers.

Snapchat

Snapchat then is predominantly a younger platform but every day is starting to grow more and more. We will probably see within the next year that the fastest growing age category on Snapchat will probably be 35 plus, that’s normally the pattern that these sites take.

LinkedIn

LinkedIn is the only channel that actually offers its own standard IAB. So, regular advertising formats like display banners, skyscrapers, and NPU formats. So it is more costly, but it is interesting that they
are the only site that still offers those desktop display options. Now, they also offer sponsored stories, which are the equivalent to a promoted post on Facebook and they’re highly effective, but you should consider that LinkedIn is a more expensive media channel. But if you have a professional audience that you’re trying to reach or an audience that is necessarily more affluent you understand exactly the industries that they operate in that’s a very effective platform to be targeting them with.

Others

There is Pinterest, but it’s restricted to certain markets. There are Tumblr ads; there are more ad platforms. If you’re starting out, try to stick to the kind of four or five major platforms that will offer you not only the ability to use media but really highly targeted media. And the highly targeted is important because it’s important that every dollar or every euro you spend is effectively used. And what’s really important here is that if you are effective and efficient, it makes that small budget go a lot further.

So think of the platforms they’re going to give you the most cost-effective return. So maybe you shouldn’t use LinkedIn if you have a smaller budget, you should probably focus on Facebook and Instagram, because that’s where you get the lowest cost per engagement or the lowest cost per site visit. It’s important that you learn what objectives you have, the results that you get, and where you get those results for at lower cost. If it’s engagement it needs to be more broader, but if it’s site visits, whatever it gets you the cheapest site visit, you chase it there and you make sure that all the budget goes there. If it’s about awareness you need to spread it, but make sure that you’re actually targeting your media spends within the object that you actually need and require.

Paid advertising channels

In a separate module we’ve actually addressed media buying more specifically. Here, we’ll recap the key watch outs for the media buying process.

- You have your media plan. You know investment by month, you know what content is available, and you know what formats are there, you know when it’s going live.
- On each platform, you need to set up your campaigns with your objectives. Is it for video or is it for site visits?
- Make sure that you implement within the target audience that’s been outlined at every phase of this so far. We know exactly who we want to talk to, we know their interests, we know how to target them by interest, and we know their demographics. Make sure that all this information is going into the campaign.
- We set our budgets and timeline for the spend based on what’s allocated on our media plan.
- And then while live, it’s important to check your spends regularly for performance. Identify content that’s not working and content that could be optimized. Make sure that, as it’s live, you’re learning and you’re iterating your spends, to make sure that you’re spending towards things that are actually working and moving away from things that aren’t working.
- You should track the performance and identify where these changes need to be made way ahead of the end of the week, or at the end of the month. It should probably be more of a daily practice.
- And results should be included in your dashboard as well. These are your media results. What is the cost per view that you’re getting? If you know how many views you’re getting, how much they’re costing you and you know that that’s a KPI for you, then you would focus in on that? And make sure that you’re using the channel that’s getting you the lowest cost per view.
This again revolves around accountability. Make that at every stage of the day, you know who is responsible for actually feeding back to you these results. Now you can actually set up ways that the reporting can happen either daily. It might happen multiple times in the week and you can actually set up ways that the reports are automatically set to you through the different channels.

**MONITORING PERFORMANCE**

**Benchmarking**

**Benchmarking against yourself**

Business have become obsessed with benchmarking themselves against their competitors. But actually, what is more important is benchmarking you against yourself. What you should be doing is recording the same information day in day out for a period of time.

Now if you are recording that, day in day out, and reporting on it regularly, you can very quickly identify if numbers are moving up or down or staying the same. So again green, black and red. What this allows you to do is to actually take complex reports and simplify them. What you’re going to be doing here is you’re going to create your dashboard with your specific numbers, your KPIs, you will see if they’re going up or going down. And each specific time periods so whether it’s every three days, every day or at the end of every week, you’re identifying those numbers and you’re seeing why they’re going up, why they’re going down, you’re asking questions. And making sure that you’re actually trying to increase performance based on the changes that you’re seeing in the dashboard.

**Calculating costs**

One of the important things with your KPIs is to understand that, while each of the channels will give you very specific column by column numbers, some of them need to be calculated. It’s important to know that if you want the cost of something, you need to divide how much you spent into the total amount of actions you had.

So, for example, cost per view is your total spend divided by total views. Your cost per engagement is the total spend divided by the total engagements. So make sure that you’re using these numbers as well in your KPIs, because they’re important figures that won’t necessarily be given to you by the actual channels.

**Smaller teams**

One of the benefits to having smaller teams is in the reduction in human error and the efficiencies. So instead of having multiple people pulling reports and interpreting them and making decisions, you have one person who’s pulling the report, reading the report making the decision on what needs to change and actually implementing it. This is a challenge to the larger organizations. For smaller organizations, their key benefit is their agility. They can move fast, they can act quickly and they can change things, and they can react to things that you do faster than you can react to the things they do.

So within the larger organizations, it’s important to have these shared dashboards. It’s important to have regular updates or even having email updates. Within each of your ad accounts, if you are a manager of a team, there are emails that you can activate that will give you either weekly, monthly or daily reports. You can actually dictate what is the information that you want in this given report. It’s
very effective on Facebook to do this, because it will give you your Facebook and your Instagram reports all in one email and you can dictate again whether it’s weekly, daily or monthly.

**SOCIAL INTEGRATION**

**Utilizing social media platforms**

**Television**

The next piece of this is talking about not just how do we utilize social media platforms, but how do we integrate it into all the rest of our activity? Because one of the things that’s really important is the importance of TV. TV makes up approximately for a large organization in excess of 50% of their media spends and their creative spends.

So TV is something that social media should be supporting. If you operate TV, your social media activity should be getting behind this. So there’s key tactics that you can implement to actually identify how you can integrate this.

- **Trans-time mapping:** When you buy a TV ad you’ll be told exactly the times it’s going to be live. Your social media ads need to be supporting this TV activity. It doesn’t necessarily have to be the TV ad itself just regurgitated, but if you have support of content or a shorter quote of the TV ad, you can put it out at the exact same time as the TV ad is going out. The user is more likely to click on the content because they’ve recognized that it is connected to a similar campaign. And then also, there can be a higher recall of your actual TV ad.

- **Hashtag integrations:** Hashtags became prominent, they were put on everything, so consider that they should be listed at the end of a TV spot, but they should be relevant. Hashtag should be trying to drive conversation, don’t just regurgitate the name of your project in a hashtag or the name of your product or service in a hashtag. It should be something that evokes the response and make sure that, that works.

**Radio**

Radio operates in a very similar way in the sense that you have trans-times, but also that you can deliver the content at the exact time. You can use radio stations to actually drive your hashtags, and they can run giveaways for you. They can also be the driver of the incentive to actually start the conversation.

**Outdoor and press**

With outdoor and press it’s the same as TV with the hashtags. It’s important to actually integrate them where social becomes really valuable for outdoor and press is where your social media activation actually get integrated into the press or the outdoor. So for example, running competitions that involve user-generated contents, so, for example, like photo competition that you’re using your press or your outdoor to actually include on the creative the call-out to actually enter this. In addition to your regular outdoor, is that if you’re running digital outdoor there are vast technical applications that you can use to actually make your outdoor even more engaging.

There are campaigns where you can have a link displayed on your digital outdoor your user can go to that link on their own mobile device and take control of the actual creative. So you can use your own mobile device to play games on billboards, it’s an amazing use of making a unit, that people normally walk past, an actual dwell space that makes them want to actually engage with it.
PR

PR is definitely the discipline with the simplest and most effective ways to integrate with social. It’s essentially designed to create conversation as a medium. So social media should be closely aligned with PR whenever PR is active.

There are two areas that are really beneficial with working with your PR team:

- **Influencers**: It’s important to have access to influencers. They have the best little black book of everybody that you could need to contact to involve in your campaign. Influencers, celebrities, journalists, and people within the community that are you know are important members. They’re respected. Your PR team is the best and it needs to get access to ambassadors, to use them in your campaign and actually use their voice to give your campaign authenticity.

- **Media integration**: This involves developing deals with radio stations to have outside broadcasts. And what’s happening a lot these days is, these outside broadcasts, instead of just going on radio, we’re using Facebook Live, we’re using Periscope, and we’re actually broadcasting them live as a panel. So it’s important to understand that the outside broadcast and any radio partnerships or media partnerships with publishers online have massive effects, and the PR teams have access to these as do your media teams.

Digital

How important is social to digital? Everything should be about the core message and the core activation of the digital strategy, and social media should sit at the heart of that. Because it should be about creating conversation online and your digital activity can at times be very specific to drive response, to drive site visits.

But overall if you’re using digital for creating a narrative or any storytelling, social should be right at the heart of that. You want it to evoke a response when people see it, and for it to create that conversation. What should be avoided is shoehorning social into campaigns at the last minute and just deciding to take the press ad and post it or to take the outdoor and post it, or to take the TV ad and post it. That’s sloppy, it’s lazy, and it’s old and it just doesn’t exist anymore in what we do. Social media has become a very evolved platform, a very valuable platform, and if you’re doing these sorts of practices you’re really under-utilizing it.
LESSON 6: MEASURING AND REPORTING ON SOCIAL STRATEGY
Key reporting tactics

We’ve talked about dashboards, we had talked about reading reports and analyzing data, and for the most part this gets easier the more you have because you’re able to actually make decisions based on them. And it takes longer periods of time to actually start to chunk larger data but actually if you’ve been using the benchmark and the dashboarding strategy, then you already have these dashboards, you just need to put them together and actually make sense of them.

The 5 Whys


And the importance of this is that we constantly push ourselves to make sure that we’re learning as much as possible out of the challenges that we had. Throughout the time period, you’ll have constantly had these reports, you'll be developing your own benchmarks, and at the end of the time period, you now have solid benchmarks, you now know what is a good number for a specific KPI, you now know what is a line that you need to be maintaining.

Now you need to identify through the year at what points you improved and where did you fall down. So, when did you go above and below that line? And then the 5 Whys; why, why, why, why, why? You have to keep asking yourself this.

And when you’re looking at specific KPIs throughout the time period, are there any specific peaks? Why did that happen and then what occurred? If that occurred, then why did that cause a response? You need to be, again, asking yourself the 5 Whys. And when did you see your strongest results throughout the whole year? What was the biggest peak that you had? And, again, asking yourself the 5 Whys.

And then, again, layer in your business performance. Layer sales over your specific kind of your key KPIs. When did they kind of fall into a pattern? When were they different? And, again, you’d see the pattern now you keep asking yourself why? You keep asking those questions.

Short-term vs long-term

So, with reporting, there’s two ways you can report.

- **Short term:** You have your daily, weekly, and monthly reports, that is for short-term performance analysis and adjustments.
- **Long-term:** Through the learn phase, quarterly, bi-annually, and annually, you use long-term reporting that chunks larger amounts of data together over the longer periods of time to derive insights and to make major strategic decisions.

So, if you need to make a major strategic decision, for example, quoting investment in one platform, you wouldn’t make that after a week on it or a month on it. You’d wait for a whole quarter. There’s no point deciding that Instagram is useless to you after two weeks. You need to give it time to bed down, you need to build a community, you need to activate it, then if it’s still not working for you, then decide at which point you’re going to make a decision.
Now, what you should be doing is, at the first quarterly analysis, saying, “Okay, that’s a problem, we need to maintain that or make adjustments.” And then at your biannual, making a decision whether you’re going to give it another quarter or whether you’re going to chop it and cut your losses. It’s about making those decisions. And when you’re implementing change, there’s key areas you need to observe to improve performance. And there’s your content performance, your media performance, and then observational conversation.

**Implementing change**

There are three specific areas for social media where you should be addressing performance to make long-term change.

**Content performance**

With your content performance, it’s important to identify whether the content strategy was being followed consistently. Were we using the right tone? Were we using the right personality? Because if it was consistent, you can then identify when the peaks and troughs occurred. How relevant are they? Did you get an underperformance because somebody put a up post, because another department forced it through? Straight away that gives you a new rule that you’ll say, “No, you don’t get to post random posts around your new campaign just for the sake of it.”

So, it’s important to use the content performance to actually use insights back into your next planning phase. So, what content works? What didn’t work? Why didn’t it work? Can we improve it? If we can improve it, what are the improvements? If we can’t, let’s get rid of it. It’s about constantly evolving everything.

**Media performance**

Within your media performance, you know what the KPIs ad that you’re tracking. Across the time period, you’re looking at what platforms drove the best results and why. What platforms drove the lowest cost and why? And what platforms are we seeing the highest engagement? What platforms are videos seeing the highest level of retention, the highest views? It’s about understanding what formats then are going to be suited to which platform with media. So you’re really starting to follow more learning.

**Observational conversation**

Your observational conversation is going in long term and looking at how often your hashtag is being used? Is it actually functional? Are people willing to actually talk about it? And then something that is really in the observational conversation and that often gets left out is the idea of using Google. Are the keywords that are important to your campaign being used more? Are you seeing queries come up on Google that are surrounding your brand? What are those queries? How can you address those queries in future content? You know, looking at searching for volumes of hashtag mentions on Instagram and on Twitter.

But what way are people using it and what can we take from their use of the hashtag? Is there a key trend that we see more mentions around? Is there a key format that we see drive more mentions? Was there a specific campaign or a specific activity or even a specific video or tweet that we saw vast quantities of mentions being used from. They’re the important things to identify because going into your next planning phase, you’ll know what was the competition prize that drove the most engagement? What was the products that drove the most conversation?
MEASUREMENT

Baked-in measurement

Baked-in measurement quite simply means that, from start to finish, measurements should be a part of your decision-making process and it shouldn’t just be a series of KPIs. Identifying KSOs is the clearest way to identify performance.

What baked-in measurement requires is that you consistently measure the same KPIs constantly so that you’re constantly able to measure against yourself and to make sure that you’re using the same numbers that are driving the performance of your KSO.

Layering metrics

In order to truly measure, you have to introduce more than social metrics into your measurement. You need to be able to layer social metrics against additional measures that you’re recording to actually correlate between them. So, for example, looking at your website traffic, your dwell time onsite, and actually layering social performance to see, does it match the same? Do the products that drive the highest dwell time on your site actually record the highest engagement? If they differ, asking the questions as to why that is and how can you actually use that to inform your content.

ROI will continue to be a myth for you if you don’t begin to establish the theories of what performance is driving the business results and testing them.

Social media has to be a part of your attribution model. It might not necessarily create the last click but we need to understand the role that it plays in the consumer journey and the actions that it’s influencing. You need to begin to develop your own formula for this, and for some businesses, except that maybe you will never have a single currency figure for performance of social but what you will have is a series of tactics and strategies that you know work and actually create performance for your business.