
Do You Need a Social Media Sherpa?

An Executive Briefing on Succeeding with Social Media

by Dana VanDen Heuvel of **MarketingSavant**



The aforementioned diagram shows the vast proliferation of marketing channels in just a few short decades compared to the otherwise slow advancement of marketing up to about 1980. Since then, we as marketers and business leaders have been charged with adapting to a world where our customers have a seemingly infinite choice of channels with which to communicate and further depths of tools within those channels that they can employ at their whim. Our job as marketers is to simply “meet them in their medium” and find the most relevant channels, tools and communication style to match to ensure that we remain relevant to our tribe.

If Marketing Moves Fast, Social Media Moves Faster

If pictures are worth 1000 words, what are images that include 1000 logos and 1000 words in the picture worth? As a test, look at the following diagram. How many of the logos within the various channels of social media can you recognize and accurately describe what the social media service actually does and how it could benefit your organization?



Source: www.theconversationprism.com



That was fun, wasn't it! While it's certainly not imperative that you know each and every social media tool and what they do, that's simply not necessary, the prior illustration is actually a old version of that particular diagram meant to show just how nuanced, complex and full of opportunity and promise the world of social media is. In keeping with the pace of social media, a newer updated version of that same diagram is available at www.theconversationprism.com, but it's so complex that it's actually difficult to fit into this whitepaper while still making the text on the graphic legible enough to read!

Show Me the ROI First

Many of you will recall, or have heard about the scene in the movie Jerry Maguire where an exchange between Tom Cruise and Cuba Gooding Junior unfolds as Cruise is pitching Gooding on using him as his agent as all while Cruise is about to be ushered out of his current firm to venture out on his own. Before Gooding signs with Cruise, he asks him, quite emphatically and repeatedly, to "show him the money." Many of us feel like that with social media – show me the money!

Well, the money is there in social media. In fact, a recent Wetpaint and Altimeter Group study confirms that deep engagement with consumers through social media channels correlates to better financial performance.

The ENGAGEMENTdb study (www.engagementdb.com) showed significant positive financial results for the companies who measured as having the greatest breadth and depth of social media engagement. These "Social Media Mavens" on average **grew company revenues by 18 percent over the last 12 months**, while the **least engaged companies saw revenues sink 6 percent** on average over the same time period.

The ENGAGEMENTdb study reviewed more than 10 discrete social media channels, including blogs, Facebook, Twitter, wikis, and discussion forums for each of the 100 most valuable brands as identified by the 2008 BusinessWeek/Interbrand. The top 10 ENGAGEMENTdb brands with their scores are:

- | | |
|--------------------|-----------------------------|
| 1. Starbucks (127) | 6. Thomson Reuters (101) |
| 2. Dell (123) | 7. Nike (100) |
| 3. eBay (115) | 8. Amazon (88) |
| 4. Google (105) | 9. SAP (86) |
| 5. Microsoft (103) | 10. Tie - Yahoo!/Intel (85) |

If you're looking for good examples of how brands are embracing social media, look at those in the list above.

Streaming Social Media into Your Marketing Mix

The most important thing for marketers to focus on with social media is how it will fit within their existing marketing and promotional mix and within their overall go-to-market strategy. In fact, we're fond of saying that social media strategy is a bit of a red herring because to be truly strategic about social media is to consider it holistically as part of an integrated approach to marketing and business development.

At this point, marketers generally start looking around for best practices, for a kit or a set of templates or some examples that point the way. We want turn-key strategies that plug and play with built-in shortcuts. The trouble is, there little of any of that to be found in social media.

The bottom line, at least today, is that there are few best practices (current practices, yes, but best practices...we're getting there) There is no kit of parts in social media. There are some examples of what works. There are examples of what didn't work. The answer is, to many social media questions, "well, it depends."

It depends on your goals, your line of business, the resources you have, the corporate culture you live, your IT/Marketing relationships, the regulatory issues surrounding your industry and a whole host of other factors. Like any marketing, where we're dealing with irrational humans and emotional beings, there's much more that's fluid than that's concrete.



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Now is a good time to begin asking some questions about how social media will fit into your marketing mix. These are just some of the questions that you should ask at this point.

- Why is social media of interest to us?
- Do we believe social media will have an impact? If so, in what way?
- What assumptions do we have about social media? What about our executives?
- Who do we want to reach and why?
- Is our industry ahead of the curve, behind it, or in the middle?
- How do we as a company feel about opening up the dialogue with our customers?
- What are our measures for success? (qualitative and quantitative)
- How much time and money are we expecting to dedicate to this?
- What practices do we see from our peers/competitors that we'd like to emulate?

Rules of the Road for DIY Social Media

The “social media dead pool” is chock full of great examples of what not to do! It’s littered with examples of social media initiatives that were completely unencumbered by the strategic process. Thus, they both fizzled and disappeared, doing little in the way of good, or harm. Or, they went down in a blaze of glory, ultimately damaging their brands in the process and leaving a scar on both the company and the name of social media.



If you ask any social media “purist”, you’ll likely encounter sentiments that, in one way or another, points to the feeling that social media was not made for marketing. However, in the real world, we know that any chance we have to reach human beings to influence their decision for corporate gain will be found and leveraged with haste. Nevertheless, social media has its own rules that even the strongest brands (especially the strongest brands!) must abide by.

First and foremost, **authenticity and genuine sentiments are revered** while fakery is reviled and swiftly punished by way of blogger outrage or other forms of widespread Internet and social media badmouthing.

Today's consumer has a highly tuned sense for nonsense, fraud and deceit. Any attempt at less being less than 100% honest and above board in social media is met with scrutiny.

Consumers have come to expect access to brands (after years of so-called voice mail and jail and phone tree climbing) and **want honest and open conversations.** They further have expectations that if a brand is engaged in social media that it abides by those principles.

A great example of what not to do comes from Wal-Mart with their 'Wal-Marting Across America' episode. This was a less-than authentic blog featuring a couple's journey across America in an RV, encountering many Wal-Marts along the way. The blog was quickly exposed and the ensuing fallout damaged the Wal-Mart brand.

Another misconception that markets hold is that social media is simply a new outlet for your conventional advertising messages. In fact, Twitter is full of just this kind of messaging every day. (On Twitter, spam messages are called "Twam") There's no quicker way to be scorned in social media than by offering the same one-way ad messages in social media channels. You will be immediately lumped into the 'noise' category and you will be promptly and permanently ignored.

Finally, **social media is a content game.** The two questions that all brands should ask are "how am I being useful in the social media channels that I'm participating in" and "what kind of valuable content can I create and share to offer something to my audience that will really engage them?" Consumers have no tolerance or patience for self-serving, useless and stale content. Many social media programs have, are and will continue to fail for this very reason.

It's because of the "content imperative", as we like to call it, that we can't recommend strongly enough that you create a social media editorial calendar well in advance of launching your social media program. If this editorial calendar sounds like something that's only for "other organizations" and not for us, then perhaps social media is for "other organizations" as well. We rarely see successful social media programs that don't have some form of editorial calendar or editorial system or process in place .

Your Blueprint for Social Media Success: 10 Key Steps

1. Strategic education

Knowing what you don't know about social media is a great first place to start. From there, there are myriad conferences, books, webinars and all manner of educational vehicles that one can leverage to learn everything you and your team need to know in order to move forward and make sound decisions about your social media strategy and tactical plan. I advocate that brands find their "Delta connection" – understand the "gap" that you're trying to fill between your current marketing strategy and the "new marketing" of the world of social media.

The goal of this step is to understand what's out there, what's possible and to give you some fodder for formulating your social media vision.

2. Define your business objectives and risk profile

Once you have a sense of the possible, the probable and are starting to get your arms around the doable, it's time to formulate your goals and business objectives for social media. Here are few questions to consider:

- a) Do you want to use social media for listening or for outreach?
- b) How will you leverage your brand assets to maximize presence in the social media environment?
- c) Do you want to use social media to get input on your product development?
- d) What are our measures for success?
(qualitative and quantitative)



Insofar as your risk profile is concerned, many companies have employed the 3-R test for entering social media. They look at their **Risk** profile, **Resources** required and **Rewards** expected to determine how well positioned they are to leverage social media. Here are a few questions to consider as you assess the risk:

- a) How do we as a company feel about opening up the dialogue with our customers?
- b) What do we perceive as the biggest obstacles to our adoption of social media practices?
- c) What if people say negative things about our company?
- d) What if one of our employees shares something proprietary or just stupid or embarrassing about our company?

The goal of this step is to outline what you expect from social media and to determine your tolerance for the potential risks that go along with social media.

3. Understand your customers (the conversation)

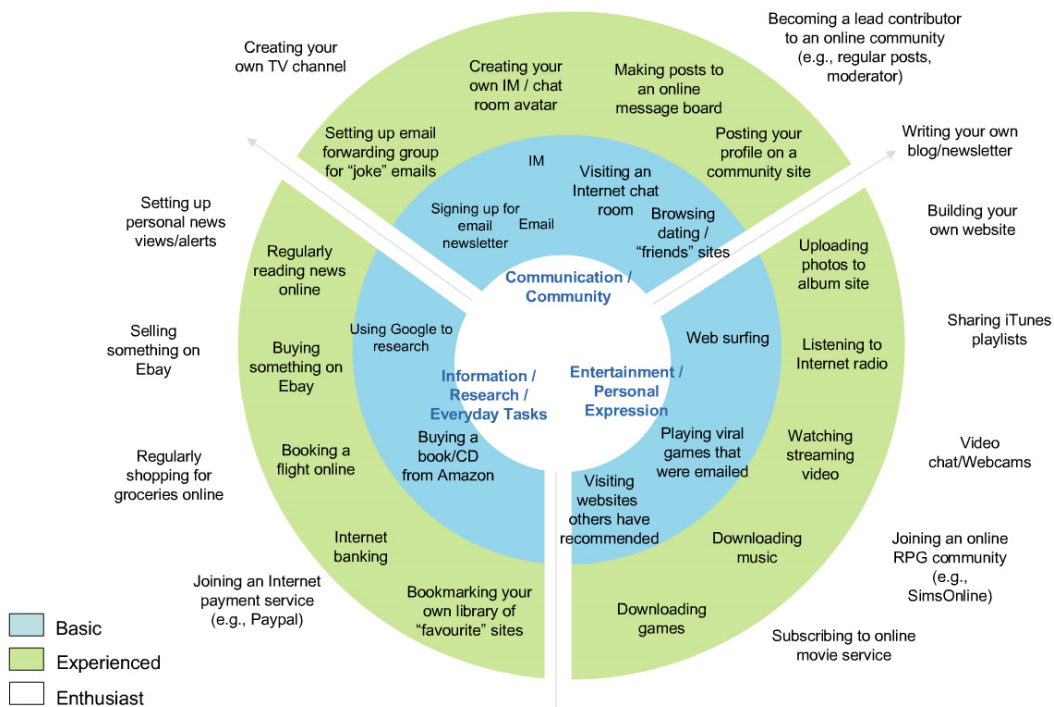
Internally, we go back and forth on whether or not this should be first, but you need to understand social media and “get to know yourself” by setting a vision, goals and objectives before you turn outward and look to your customers and external stakeholders.

While social media is all about conversation, it’s also about people and content. Just as you would not go to an in person meeting with a prospect or to a networking meeting to connect with other professionals without a clear sense of who you are and what value you add to the world, you wouldn’t enter social media without the same level of personal understanding.

That said, this is the point where you engage in online social media listening through RSS feeds, blog searches and Twitter searches to determine how involved your potential audience is and where they’re hanging out. Ask these questions about your customers:

- a) What are our customers doing online? Is social media relevant to them?
- b) Who do we want to reach and why?
- c) What do we want from them and what do we want them to do?
- d) What are we giving back (value) that has nothing to do with our product/service?
- e) What data do we want/need to gather during our efforts?

By this point, you want to have a clear understanding of what your customers and prospects are doing with social media and begin to formulate some idea of how your brand’s entrance into the space is valuable and useful to them.



Source: Isobar

Use this “Internet Use Stages” diagram to profile your customers and community members.

4. Understand the competitive and industry environment

Competitive analysis, while important, should not be the determining factor on what you do with social media. There is much me-tooism going on out there, and it's understandably difficult to watch your competition get a leg up on social media while you're on the sidelines. However, if you're going to trump them, you need to understand what everyone is going, and then craft a strategy on how you'll do better.

Once you understand the social media scene in your competitive space, your most important task is to craft a strategy that puts you out in front of them.

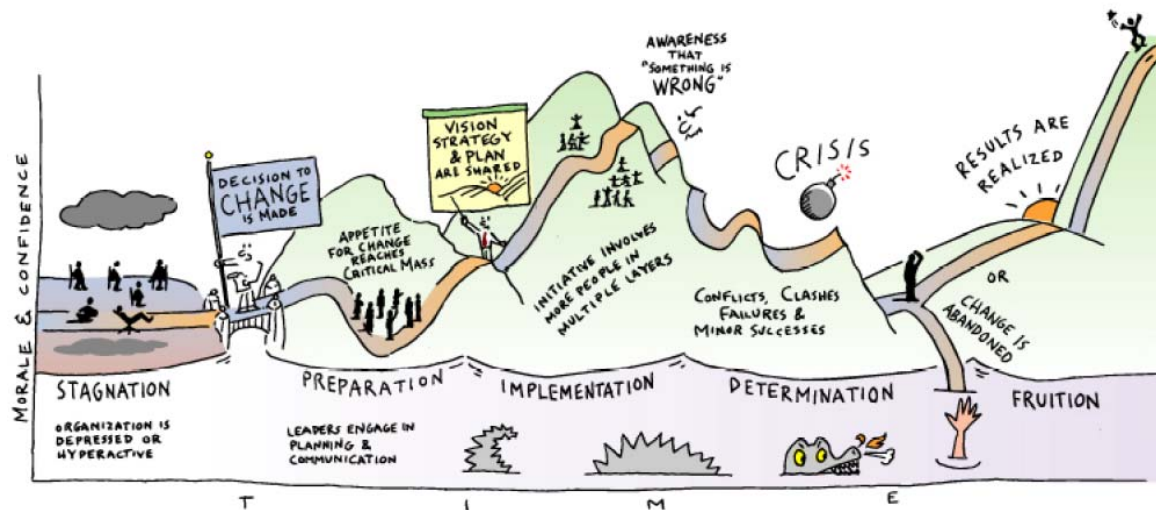
5. Anticipate corporate culture shift/shock

This stage is a reality check for most organizations. Understanding how your team, your sales force, your distributors and other stakeholders will react to social media is an important step in making your social media strategy a reality. For some companies, this is a non-issue. However, for many, especially larger, more conservative organizations, this is something to be studied and thoroughly understood.

- a) Do our employees engage in social media in their personal lives? What level of familiarity can/should we expect?
- b) Does our internal audience understand the business potential of social media, or are they skeptical?
- c) What are the biggest fears/hesitations that we have as a company about using social media?
- d) How detailed do we need to be about our communication policies?
- e) Are we empowering our employees to respond at the point of need, regardless of their role? Is there a "chain of command"?

The change process map on the following page illustrates some of the pitfalls and highlights of taking the organizations down any new path, including getting involved in social media.

CHANGE CURVE



6. Assess your resources and capabilities

The astute marketer will work on forging strong relationships with IT, legal, HR and the other stakeholders that can be impacted by a brand's involvement in social media. Getting all of these people in a room to discuss your progress so far, the goals that you've put forth, the customer potential and the rationale that you've developed for why the company needs to pursue social media will give you a clear view of what you have to work with and what work you still need to do to get the organization aligned behind the social media program. There are a few questions to ask at this point:

- How much time and money are we expecting to dedicate to this?
- Can we afford to keep part of our allocated \$ budget flexible to respond to evolving needs?
- If we're successful with social media, can we scale our interactions to continue to meet higher expectations? How?
- Are we flexible enough within roles/responsibilities to shift them as needed to accommodate what we learn from social media?

Getting everyone in your organization aligned on the goals, objectives, outcomes and roadblocks and working toward them as a team is the milestone for this phase.

7. Immerse your marketing team in social media

The organizations with the best track record for implementing social media, Internet marketing, CRM or anything new are those that immerse their teams in the practice and application of new things to ensure that they have the skills and mental horsepower to see the program through. Getting your team to experiment, attend webinars, read and otherwise get a full grasp on the world of social media will help your program move at light-speed instead of at a snail's pace as everyone plays catch-up.

Getting your team excited about social media by encouraging and enabling their participation is a sure way to speed up the success of your social media efforts.

8. Formulate the strategy and tactical plan

You've laid the foundation for putting together a comprehensive social media strategy. Your strategy should be a plan to utilize your resources, capabilities, and learned social media skills to manifest the goals, objectives and customer value proposition that you've articulated in the previous steps.

Your strategy needs to have a narrow focus, initially, to ensure that you're "doing the doable" and doing social media well before branching out into too many social media channels at one time and doing them all half-baked. Create a platform, such as a blog, on which to launch your strategy and pursue a vetting process with each new technique and tool such that everything supports your initial strategy and builds on what you've already launched.

Your strategy should cover your social media launch, or pilot program, all the way through your first 9-12 months of activity to give you an idea of what's possible and what's involved.

9. Prioritize the plan and execute with vigor

A well crafted strategy with a tactical plan that's executed like you mean it, regardless of how "good" the overall strategy is to begin with, is going to set you apart from your competitors in rapid fashion, bring quick and meaningful feedback into your program and attract the following in social media that you're seeking.

Commitment to disciplined follow through (blogging daily, tweeting regularly, posting frequently, creating meaningful content, engaging in meaningful dialogue) will bring your strategy to life and establish momentum that's hard to overcome by even your best competitors.

Your success is also determined by the resources you put toward your social media tactical plan. Don't skimp on this. You can worry about putting things on autopilot later. For now, ensure that you're manning the battle stations and are ready for anything!

The prioritization exercise will help you decide what to do first (next actions) when launching your social media tactical plan and putting energy into the execution will ensure a "no excuses" rollout.

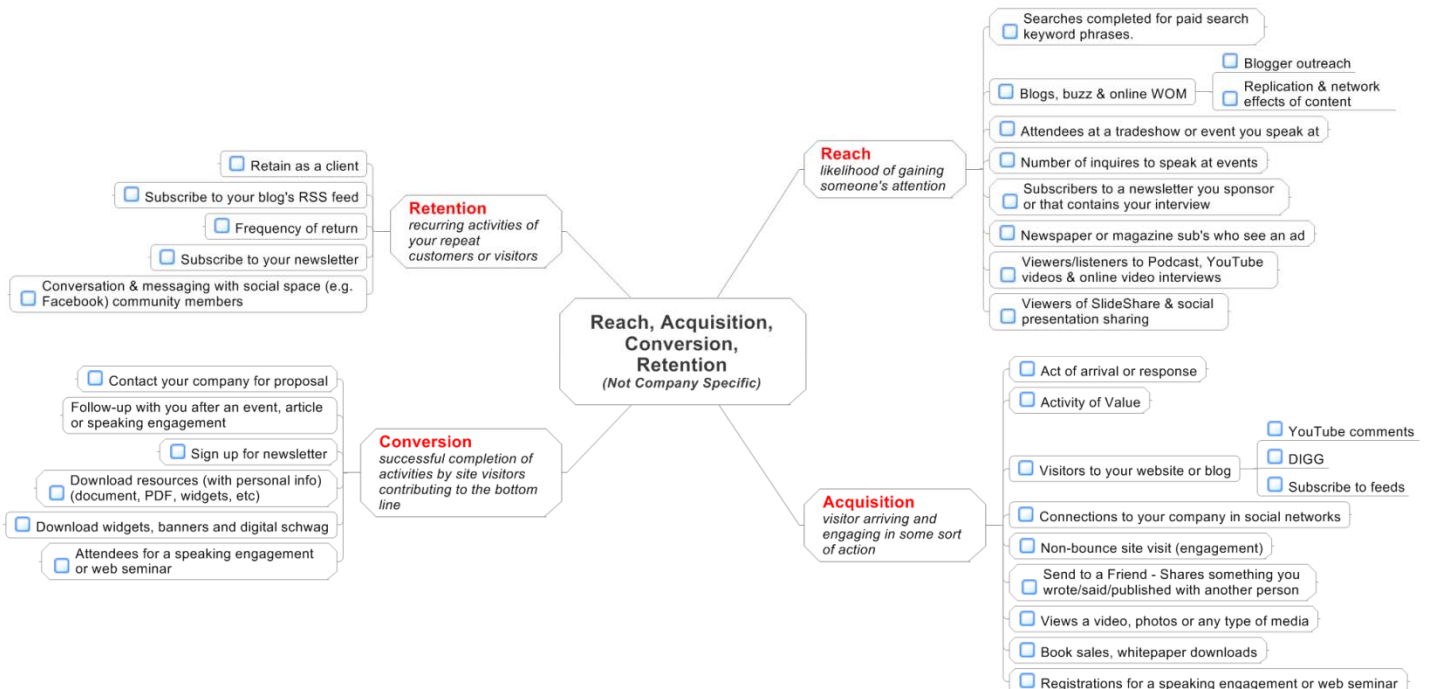
10. Measure, report review and revise

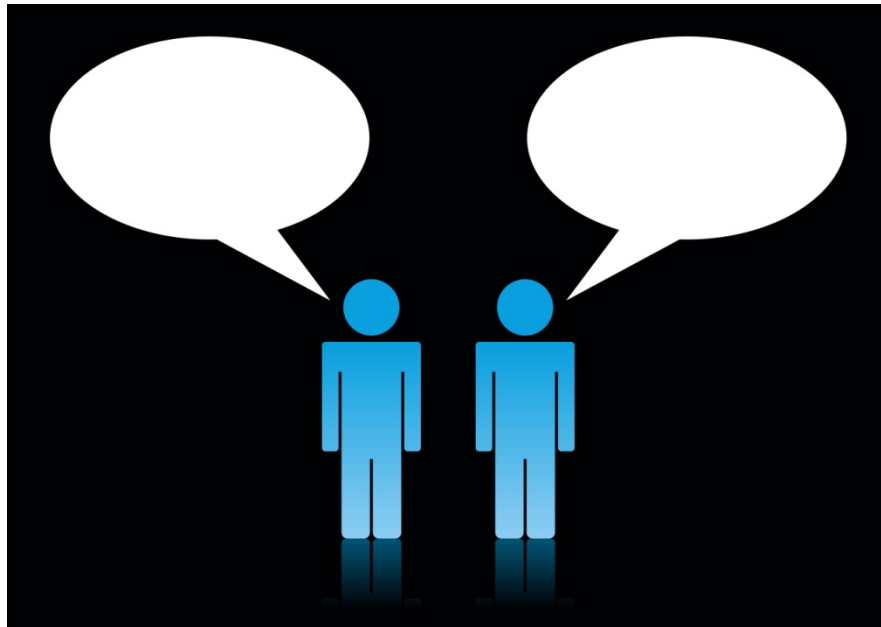
Measuring social media performance, on both quantitative and qualitative scales, is an essential activity. However, clear thinking about Return on Investment (ROI) is today's greatest challenge and thus greatest opportunity for social media marketers. In spite the current pressures on marketing departments to justify their expenditures and deliver ROI, and alarming number of companies have committed to social media efforts without first establishing parameters for defining social media success, clear-cut metrics and accountability measures.



Social media measurement comes with its own set of challenges, which is part of the reason for the current situation. Classic measures of reach and frequency of the old media world will no longer suffice and the nascent measurement concepts like "engagement" are not universally understood and differ from agency to agency and brand to brand. Nevertheless, establishing baselines before entering social media and then iterating on the metrics as you move forward is a sure way to gauge success, even if you can't fit your social media metrics into a tidy spreadsheet on day one.

Metrics vary, but many companies have measured social and digital media success by adapting their metrics to the Reach, Acquisition, Conversion and Retention (RACR) model popularized by a number of Internet marketers over the past several years.





Social Media Sherpa Diagnostic – Do I Need a Social Media Guide or Consultant?

The beautiful irony of the social media space is that as soon as someone dons the “expert” cap, it’s as though they’ve put on a digital “dunce hat” and they’re soon ridiculed by the social media insecure and viewed with scrutiny by any commercial concern. In any other industry, expert status is a great achievement.

The bottom line is this: thinking in terms of tools or platforms is the wrong viewpoint as their use is only limited by your creativity. A literacy of all communications platforms is necessary, as then and only then do they fade into the background of your thought processes and allow you to develop groundbreaking solutions.

In spite of the ease which an organization can pick up a social media tune and begin to play, just because you can hum a few bars with aplomb doesn’t mean that you have a social media strategy and that a good social media coach won’t be of value. On the contrary, the more facile you are with marketing and technology, the more effective you will be with a social media guide to help you focus and strategize to ensure that you’ll get some quick wins and long-term impact. Do you need to hire a social media Sherpa, guide, or expert? Ask yourself these questions to help determine your needs:

1. How did I arrive at social media and why am I asking about it at all?

Are your competitors already in social media? Are you trying to get ahead of the curve, build a personal brand, establish a community or reclaim your online reputation? Do you want to build buzz about your brand or maybe show the Gen-Y crowd that you’re with it?

While these are all wonderful goals, now is the time to reflect on your overarching marketing goals and how social media fits. Ask yourself “can I achieve all of these on my own?” Do I have the tools, time, know-how, stamina, foresight and insight to make these goals a reality through social media? If there’s a hint of no, consult someone.

2. Who are we trying to reach and why?

Are you targeting a new audience, tapping into your industry veterans, or trying to move a market up the technology ladder? Do you know where to find your targets online and how to interact with them when and where you find them? If not, it might be time to seek the assistance of someone who’s done it.

3. Are you comfortable with the technology, the ambiguity and the fast pace of social media?

If you’re a can-do person with no fear, then by all means, go for it! If you’re a great strategist but lack the technology skills of if you’re unsure about whether or not your IT personnel will understand your need to un-block the social media sites that you can’t see from your corporate computer, perhaps it’s time to call in someone who’s run this race before.

4. Am I informed about social media?

The very first step in the social media strategy that we advocate is to get educated. There are myriad conferences, webinars, books, whitepapers and blogs with which to get acquainted with every nuance of the social media space. Regardless of whether you hire someone, this is the best investment you’ll ever make in social media!

5. Do I have the time to do this all myself?

You probably already have some idea of “what” you should be doing, but may lack the in-house resources to get the ball rolling or to sustain the effort. A word of caution here – we never recommend the wholesale outsourcing of social media. Social media must be something that the company is involved in, not that they vend out. If you’re looking for someone to Tweet for your, reconsider your social media motivations before proceeding.

Finding Your Ideal Social Media Sherpa

If you've reached the end of the diagnostic questions that you've decided to reach out for some help, it's now time to sort out who the real "social media Sherpa's" are. They're actually pretty easy to find. Consider these questions & criteria:



1. Tell me about the best outreach you've done lately. What did you do?

Ask about specifics, what have they done? Not every firm has a great deal of experience, but some is necessary. What strategies did they use? What were their results? If they haven't been in the trenches of a project sometime in the last 12 months, you should ask them why. Yes, this industry moves that fast.

2. Tell me about a campaign that didn't go so well. What did you learn?

Social media is in its nascent stages now. A firm with social media failures is likely to be a better organization because understand the issues and should show willingness to share missteps and the learning that came about.

3. How do you feel about Twitter?

If they tell you that you should be on it and that they can handle it for you, they may not be a fit. If they have a process for determining if Twitter is right for the client, you're on the right path!

4. Do I/we need a (blog/Facebook page/podcast/viral videos)?

Look for more questions than answers on this one. A good social media Sherpa is there to guide you to the ideal solution for you, not push you into something you can't sustain. Expect to be asked questions like "Who is your audience? What is your goal? Why social media and why now?"

5. What outcomes can we expect?

A good social media Sherpa will work with you to set realistic expectations. Not everything will work for you, but a good Sherpa should be willing to help find the most resonant, effective strategies. If you are guaranteed a high number of Twitter followers or Facebook friends; if they tell you, unequivocally, that they can deliver astronomical traffic or conversions, then be skeptical.

6. What is your pricing structure?

Social media Sherpa's will typically work on a "per project" or hourly basis, unless you're seeking a retained resource or partner for the long term.

7. What can we do now to get started?

The best social media programs typically involve parallel paths of research and strategy combined with immediate action. Look for some published resources from the Sherpa that you can glean the basics from along with their initial assistance to get you off the ground while they help you build your overall social media strategy.

Moving Forward

The social and digital media world moves rapidly, to say the least. New tools, new ideas, new strategies and a digital media landscape that's constantly in a state of flux makes things interesting and challenging for even the most astute marketer to keep up with. Certainly many brands have gone it alone up the social media mountain, but it can be a lonely journey. The storied successes that you read about in this guide and see mentioned every day in the media are brands which have, by and large, chosen to seek out a social media guide to lead them on their journey. Our aim in this guide is to share you some perspective on what you can and should do now to boost your social media efforts while sharing some perspective on when to engage and what to look for in a social media marketing guide.

A little knowledge is a powerful thing! Once you've armed yourself with the tools and the help you need to succeed on your social media journey, rest assured that the journey will be a successful, profitable and exciting one!



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An award-winning blogger himself, Dana has engaged over 2000 marketers since 2004 on the subject of social media marketing through his courses, American Marketing Association training events, direct consultations and through his blogs at www.danavan.net, www.marketingsavant.com and reaches many more through articles, podcasts, webinars and whitepapers like this one.

The MarketingSavant Group

MarketingSavant is a consulting-led B2B marketing firm specializing in helping our clients attain thought leadership in the markets they serve.

We help our clients create their own whitespace in a field of competition enabling your success through content and go-to-market strategy that motivates your prospects and drives business.

We're not an ad agency. In fact, we're a consulting shop with passionate leader who loves the intersection of content, marketing, technology and helping the insurgent marketer win the business.

How Companies Use MarketingSavant

- Entrepreneurs and startups use us to plan their attack and put together a go to market strategy that accelerates their growth.
- Small and medium size firms use us to help them stand out from the pack in a crowded local or regional marketplace.
- Large companies use us to help them focus the expertise, resources and budget on creating and channeling their expertise and intellectual capital into thought leadership campaigns that win business.

You can learn more about MarketingSavant, our social media and thought leadership marketing services and our process and point of view at www.marketingsavant.com.

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