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# PART 1

# PLAN

## Developing a successful social media strategy

Strategy matters. Without strategic planning, time and money is wasted on tactical activities that are not aligned to real priorities. Too much attention is given to outputs – cleverly worded tweets, attention-grabbing posts, amusing videos, beautifully art-directed images, funny Snapchat filters – and not enough on measurable outcomes. Opportunities are missed. Bad ideas slip through the net, while good ideas are underfunded. Lessons are not learned. Risks are taken that are avoidable.

My primary purpose in writing this book is to encourage you to think, to analyse, to plan, to ask questions before embarking on any social media initiative or making any significant investments. This need not be complicated or time-consuming. Nor should it discourage you from experimenting – the best strategic plans should encourage the testing of new ideas – but these experiments should be seen as part of a broader plan, rather than as one-off or random initiatives. Social media offers almost unlimited creative possibilities, which ironically can present its own challenges.

## Case study

### The dangers of losing strategic focus: a cautionary tale from Sweden

The Swedish financial newspaper *Dagens Industri* commissioned a film called 'The greatest ad campaign ever'. You can still find it buried in the deeper recesses of YouTube.<sup>12</sup> It describes a fictitious launch of a Japanese car brand, called Zebra, into the Swedish market. A breathless commentary describes how the agency behind the launch decided to create a real zoo and then involve people in shaping a campaign in which they could 'name the zebra', view live footage from the zoo through a range of social media apps and get involved in zoo-based conversations online. The film carries the viewer through an escalating series of ever-more creative social media tactics, before the punchline, 'And then we woke up sweaty, as if after a nightmare'.

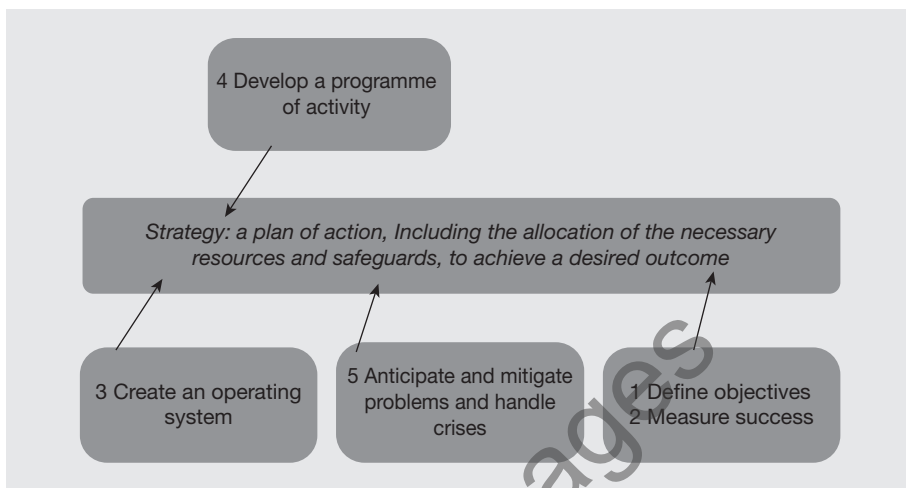
The people behind the film at *Dagens Industri* clearly had a vested interest in cutting through the hyperbole surrounding social media and promoting traditional, print advertising, but, in doing so, they provided a brilliant illustration of the way in which the unlimited possibilities provided by social media can lead teams to get carried away with their own creativity. At some stage during this (admittedly fictitious) story, the people behind the campaign lost sight of the original objectives.

Hopefully, had this been a real-world case study, someone would have spotted what was happening and called a halt to the madness. This is a key strategic task – making sure that the people responsible for social media campaigns do not lose sight of the core objectives and get carried away by a bout of self-indulgent creativity or an excessive enthusiasm for the latest technological solution.

In the spirit of all business books, let's start with a definition. I define a strategy as *a plan of action, including the allocation of the necessary resources and safeguards, to achieve a desired outcome.*

<sup>12</sup> <https://www.youtube.com/watch?v=FOcujXpbkhg>, *Dagens Industri*, April 2010.

In the following figure, I have unpacked this statement to illustrate the different elements of strategic planning . . .



What is a strategy?

You will notice that I have broken down the strategic planning process into a series of stages:

- 1 **Define objectives** (see Chapter 1).
- 2 **Measure success** in achieving those objectives (see Chapter 2).
- 3 **Create an operating system**, which includes the social media channels you need to deploy and the people and the policies and processes you need to put in place (see Chapter 3).
- 4 **Develop a programme of activity** that harnesses your operating system to deliver your objectives (see Chapter 4).
- 5 Ensure that management safeguards are in place (such as the knowledge, skills and systems) to **anticipate and mitigate problems and handle crises** (see Chapter 10).

Sample pages

# CHAPTER 1

# DEFINING YOUR OBJECTIVES

## Why this is important

It is essential that you have a clear idea of what you want to achieve from your investments in social media. Embarking on an unstructured and unfocused set of activities or simply having a token presence on the primary social media channels – something that many organisations were guilty of during the early years of social media – wastes time and money and potentially means that you are missing opportunities and exposing your organisation to unnecessary risks. Having a poor presence on Facebook, because you feel you need to be on Facebook, is worse than having no presence at all.

Defining objectives is about determining priorities, which is where things get challenging because social media can fulfil many different roles:

- **Promotion** – increasing awareness or enhancing the reputation of an organisation and its brands, products or services amongst its customers and other stakeholders. This tends to be the primary reason why most organisations invest in social media – it provides them with a range of channels to reach and engage their target audiences cost-effectively.
- **Mobilisation** – encouraging some form of positive stakeholder action, such as visiting a website, registering to access further information or joining a campaign.

During the early days of social media, the tech-savvy activist community was quick to spot how social technology, and the collaborative behaviours it was encouraging, could provide a new way to mobilise activists, supporters and other like-minded people behind a shared purpose or common goal. The challenge of coordinating the efforts of disparate groups of individuals, often in different locations, could be overcome by the creation of a Facebook group or campaign hashtag on Twitter. The simple act of ‘liking’ a campaign or

signing an online petition provided people with an easy way to demonstrate publicly their support for a particular cause or issue. Some dismiss this watered-down version of popular activism as ‘slacktivism’ or ‘hacktivism’, but it has transformed campaigning.

- **Prospecting** – identifying and nurturing potential sales leads. This has encouraged the emergence of a new discipline of ‘social selling’, with the use of social media facilitating the identification and nurturing of connections and turning them into business prospects.

A delegate attending one of my workshops explained how social media prospecting has largely replaced traditional conferences and exhibitions as his company’s favoured way of generating business leads. ‘We operate in a specialist sector in which we know already the 5,000 customers we need to reach. There is always a place for traditional, one-to-one communication, but social media is far more cost-effective than our old approach of booking a trade stand.’

- **Recruitment** – identifying and engaging new talent. This is achieved both directly through the use of recruitment advertising on LinkedIn or Facebook, but also indirectly by using social media to showcase the attractiveness of the organisation’s culture to potential recruits.

## Example

Oil giant Royal Dutch Shell regards recruiting the best talent as one of the primary drivers of its investment in social media. The company’s global channels manager for recruitment marketing says, ‘Using social media, we have grown our brand presence exponentially over the past five years and reaped benefits in the form of building strong relationships with top talent as well as hiring them faster and smarter . . . Channels like Twitter or Facebook play an important role here . . . because of their size, they drive engagement widely. Thanks to these and other relevant channels, we are reaching a much more diverse set of talent and unlocking talent in hitherto untapped places.’<sup>13</sup>

<sup>13</sup> ‘Getting Social: Oil, Gas Finding Success Using Social Media in Recruiting’, Rigzone, 7 May 2015.



## Example

Telecoms network O2 uses social media to attract digital talent to its business, primarily through showcasing the culture and quality of its workplace experience. The company's head of leadership, Michelle Adams, told *HR* magazine, 'At O2, we want to be known for being an exciting, fast-paced environment that's at the cutting-edge of digital, so we make sure those aspirations are reflected across all our social media platforms, and that our online personality matches up with the experience people get when working at O2.'<sup>14</sup>

- **Customer experience** – enhancing relationships with customers, identifying potential problems and delivering a more effective customer service experience.

## Example

Innocent Drinks has always been an innovative user of communications. The company's communities manager, Helen Langdon, told *PR Week* about her role, 'At the heart of it, our [social media] team exists to look after our "drinkers" . . . Some people get in touch with genuine customer service questions, but most of the time we're just having great chat with people – so it gives us the space to have a bit of fun and really show people what innocent is all about as a brand.'<sup>15</sup>

## Example

First Direct has built its award-winning reputation in the banking sector on exemplary customer service. The company's customer services director, Karen Walker says, 'Our people are the heart and soul of our business and the conversations we have with our customers mean we can really get to grips with what our customers need. We don't have branches, so we use our social channels to extend our personality beyond our office walls as we engage with our customers on a personal level that they love.'<sup>16</sup>

<sup>14</sup> 'Getting social media recruitment right', *HR*, 26 January 2015.

<sup>15</sup> 'Confessions of a social media manager: innocent on looking after its "drinkers", nonsense and #dogsatpollingstations', *PR Week*, 10<sup>th</sup> March 2017.

<sup>16</sup> 'Is your bank trying too hard to be 'cool'?' *The Daily Telegraph*, 23 December 2015.

- **Internal communication** – enhancing employees’ understanding of the organisation’s vision and values and encouraging teams to collaborate more effectively.

According to a study by consultants at McKinsey, ‘Social tools influence the flow of information across a company, which enables changes in how people work and, eventually, new forms of organizations. As organizations face growing demands to become more agile, social technologies will enable companies to experiment further with new corporate structures and processes that are more project based, self-organizing, and less hierarchical.’<sup>17</sup>

- **Insight** – providing an enhanced understanding of the needs and interests of customers and prospects.

## Example

Samsung is endeavouring to find an edge over Apple in the battle for supremacy in the global smartphone market by mining social media for customer insights, which it uses to tailor its marketing strategy. Its analysts work with social analytics company Crimson Hexagon ‘to uncover deep insights on trend sentiment feedback and purchase intentions. The platform provides demographic data around audiences, their interests and influences, and the meaning and intent of each social media post based on specific emotions.’<sup>18</sup>

- **Innovation** – collaborating with external partners on new product development.

## Example

Unilever developed its matcha green tea in partnership with a collection of tea-drinking connoisseurs, identified through their social media behaviour. The company’s global vice-president of digital transformation, Rahul Welde said, ‘The key idea is that communities can actually transform businesses in multiple dimensions, not only engaging people to buy more products through brand love, but through creation.’<sup>19</sup>

<sup>17</sup> ‘How social tools can reshape the organization’, McKinsey Global Institute, May 2016.

<sup>18</sup> ‘How Samsung uses social media analytics to understand customers and guide strategy’, Computerworld UK, 20 October 2017.

<sup>19</sup> ‘Unilever backs voice to deliver digital transformation’, *Marketing Week*, 9 October 2017.

- **Operational efficiency** – for larger organisations in particular, social media offers the opportunity to reduce business costs, enhance employee performance and facilitate the introduction of slicker, more agile operating systems.

## Example

RSA Insurance, as part of a project termed The Big Upgrade, reduced its internal email traffic by 40 per cent following the introduction of a social media-style, cloud-based solution. According to the company's communications, brand and social media director, Jenny Burns, 'Most of our employees use social media at home. Giving them similar technologies for their business lives was a no brainer . . . Our aim is to bring all our 19,000 people together under one virtual roof so they can collaborate globally, boost customer service, reduce costs and maximize productivity.'<sup>20</sup>

## Example

A utility company claims that each view of one of its YouTube customer information films by a customer who otherwise would have contacted its call centre to find the solution to a simple problem – such as 'how do I read my meter?' or 'how do I understand my bill?' – equates to an £80 saving to its customer service costs. Given the volume of calls received by most utility companies, it is easy to see how this, potentially, represents a huge cost saving.

I have yet to come across any organisation – no matter how analogue its business model – that cannot benefit, to some extent, from the use of social media, whether in enhancing its overall business performance or reducing costs.

## How to define your objectives

I recommend that you create a cross-functional group, bringing together different disciplines from IT, HR, communications, customer service, sales, marketing and, most importantly, the people responsible for delivering day-to-day social media activities.

<sup>20</sup> 'Digital transformation makes collaboration cool', [www.bt.com/casestudies](http://www.bt.com/casestudies).



**Figure 1.1** The three ways to define your objectives

You should base your choice of objectives on three considerations:

- 1 How social media can best support your organisational priorities.
- 2 How you can use social media to meet the needs or expectations of your stakeholders.
- 3 How you can use social media to enhance your operational performance and efficiency.

Inevitably, there will be overlaps, for example satisfying the needs of customers or shareholders is, hopefully, a priority for most organisations.

## How social media can best support your organisational priorities

I have frequently observed a lack of alignment between social media activities and the things that really matter to an organisation's senior leadership team. This typically reflects a lack of understanding of the organisational priorities by those responsible for delivering those activities, often because they are denied access to the 'top table' where key decisions are debated. It should be relatively simple to address this knowledge gap by giving the social media team access to the senior decision-makers and an understanding of the organisation's challenges, objectives and strategic goals. It helps if the senior leadership team is actively engaged in setting the direction and monitoring the performance of the social media team.

## How you can use social media to meet the needs and expectations of your stakeholders

Your focus should be as much on satisfying the needs and expectations of your stakeholders as on supporting your own corporate agenda.

- Customers expect that the organisations they deal with are accessible and suitably responsive on whatever channel they want to use, including social media.
- Employees expect to see news about their employers in the social media channels that they rely on increasingly for news and information.
- Potential employees expect to be given a good understanding of the organisation's culture and working environment, both through corporate social channels and the posts and tweets of its employees.
- Clients or business partners expect to see the company and its senior team demonstrating their expertise in channels such as LinkedIn.
- Analysts and investors rely increasingly on channels such as Twitter to provide them with information on a company's financial performance.

Meeting the needs and expectations of your stakeholders requires a thorough analysis of their social media habits and preferences, focusing on the following questions:

- What channels do they use?
- What types of content and experience do they appear to find most valuable, based on what they are sharing and/or commenting on?
- What do they want/expect from you when it comes to communication?
- How effective is your current communication with them and how might it be improved through the use of social media?
- How else could you meet their needs that are currently not being addressed?

Ideally, you should handle this as a structured process, involving social listening tools, research and insight experts and, potentially, investing in market research. However, even relying on informal analysis and listening to the opinions of internal experts will give you useful insights into stakeholder needs and expectations, for example your customer service team should have a good understanding of the expectations that your customers have from social media.

You should repeat the stakeholder analysis on a yearly basis to establish whether their social media behaviour and preferences have changed.

## How you can use social media to enhance your operational performance and efficiency

You should focus your discussions on the following potential opportunities:

- Reducing the cost of customer service, where this represents a significant cost to the organisation.
- Enhancing internal communication and collaboration, especially where there are opportunities to reduce the email burden.
- Reducing marketing costs, such as the use of direct mail, which might be replaced by more cost-effective digital communication.
- Reducing market research costs, where you are spending large sums of money on traditional surveys.

Ideally, you should undertake a cost/benefit analysis to establish whether it is worth using social media instead of or alongside your existing operational activities.

I have developed a simple template to help you capture the outputs from your various discussions and determine the desired outcomes from your investment in social media, shown below.

### Template

Defining your objectives

Question	How can social media support our organisation's priorities?	How can social media help meet the needs and expectations of our stakeholders?	How can social media enhance our operational performance and efficiency?
Priorities	1	1	1
	2	2	2
	3	3	3

It is widely acknowledged that programmes with the fewest objectives have the greatest chance of success. I would, therefore, recommend focusing your social media investments (and the efforts of the social media team) on a maximum of two or three objectives. Although, ultimately, it depends on the scale of resources you have available, do not spread yourself (and, most importantly, the time and efforts of your social media team) too thinly.

## Key learning from this chapter

- 1 It is essential that you define the objectives you want to achieve from social media before embarking on any significant investments.
- 2 Social media can contribute far more than simply promotion. Customer service, internal communications, recruitment, research and new product development are all areas that can be transformed through the use of social media.
- 3 In defining your objectives, you should consider things from three dimensions – how social media potentially can support your organisational priorities, meet stakeholder needs and expectations and (for larger organisations) deliver operational efficiencies.
- 4 Ideally, you should focus the efforts of your social media team on the delivery of a handful of objectives, rather than risk spreading their efforts and your investments too thinly.

### Suggested action steps after reading this chapter

- Review your existing social media activities to establish whether they are supporting your organisational priorities and meeting stakeholder needs.
- If you are using social media almost exclusively for promotion, consider whether it could be used to support other objectives.
- If you are working within a larger, more complex organisation, especially where you have an expensive customer service function, investigate whether you can use social media to enhance performance, deliver operation efficiencies or reduce costs.