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STRATEGIES & TACTICS

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Foreword

Dear reader:

To call social media revolutionary would be a drastic understatement. Only a little more than a decade since the first Facebook account, social networks have become so ingrained in daily life that imagining a world without them is about as difficult as imagining a world before the light bulb or automobile.

Networks such as Facebook, Twitter, Instagram, LinkedIn and others have transformed the way we communicate, both in our personal lives and at work. In the field of public relations, widespread adoption of social media kicked off a renaissance of sorts, providing new ways for brands and organizations to engage directly with their audiences.

As these tools have rapidly evolved, they have created both new opportunities and new headaches for professional communicators. Reaching an interested audience with a tailored message in real-time has never been easier, and brands and organizations that have found their sweet spot are reaping tremendous benefits from their social media presence. But, with all of this connectivity have come some serious issues, especially in crisis and reputation management. Crises that once moved at the speed of newsprint now move at the speed of fiber-optic cables. An ill-advised tweet can bring down a once-sterling reputation in a matter of hours or minutes.

PR professionals are reminded every day how much the digital space is changing the industry, and many questions remain. How can social networks best be put to use? What's the best way to engage with audiences that have just recently been given a voice? Is this specific network a good fit for my organization? Are social strategies really working, or are they just adding to the din and distraction?

In this 1st edition of PR News' *Book of Social Media Strategies & Tactics*, the challenges of planning, executing and measuring successful social media campaigns are met with nearly 70 articles covering all the major networks. From agency practitioners and brand managers to academics and tech leaders, our contributors bring insights from a variety of sectors to tackle the problems facing professional communicators in the age of social.

I want to thank these contributors who so eloquently shared their ideas, tips and best practices.

I also want to thank you, our readers, for letting us help you as you learn new skills, hone existing ones and grow your businesses.

B. Greene

Brian Greene
Editor, PR News

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Measuring and Communicating Social Media Success

How to Use Social Media Data to Present Insights That Matter to Your Organization

By Brian Keefe

Tracking social media metrics is nice. Tying metrics to outcomes is essential. How do you use social media data to present insights that matter to your organization? This article will show one way to do that by using a conversion funnel that maps social media metrics to a customer experience journey.

Why Measuring Social Media Metrics Is Hard

Social media is wildly measurable. You could easily drown in a sea of metrics, unsure of what is and isn't important to track over time. It's impractical to measure every single thing on your social media accounts, but how do you sort through the data to find metrics that provide the insights that matter to your organization?

Our team wrestled with this question several times, and we faced challenges answering it. Each social media platform has its own goals, measurement schemes and intended uses. Each platform reports metrics in a slightly different manner due to its unique data structure and analytics approach. Each platform can have distinct intended outcomes, target audiences and outreach approaches. Finally, often multiple tools are used to capture and report social media data, so numbers may not always line up across programs. It can get messy in a hurry.

> **Delivering the brand promise, providing a worthwhile customer experience and increasing engagement are objectives for which social media are built and should be measured.**

To reach a point where we could gain social media insights on a regular basis, we needed to identify and leverage the commonalities found among various platforms. We needed to create structure. Developing and applying a structured framework to enable the proper tracking of links and content types, therefore, became one of our top priorities.

Using a Social Media Conversion Funnel to Provide Focus

The need for a structured approach to collecting, analyzing and leveraging social media data led to the creation of a standard, yet agile framework of five high-level engagement outcomes. Each outcome within the framework is aligned to goals and strategies that support organizational objectives, adapted for social media outreach. The framework is presented as a five-stage conversion funnel, reflecting users' deepening level of commitment to your social media accounts as they move from being aware of an account to regularly visiting

and engaging with the account. In short, the funnel aligns to the optimal user journey by following your customers' use of your social media assets.

During development, we actually considered using a journey map rather than a funnel, but we settled on the funnel as a way to couch journey maps in a measurable framework. By tying key performance indicators (KPIs) to these outcomes, you'll be able to measure and track the effectiveness of your accounts over time.

The five-stage conversion funnel was developed by **ICF International** for the **National Cancer Institute**'s Smokefree Initiative, a W eb-based intervention to help people quit smoking. Smokefree has an incredibly robust social media presence, with 14 social media accounts aimed at various populations that smoke.

Since this type of funnel was arranged specifically for this health behavior change intervention, the conversion model might be appropriate as a final step for organizations that aim to have followers purchase items or register for a particular service. A purchase or signup does not have to be the end point for your users. Delivering the brand promise, providing a worthwhile customer experience
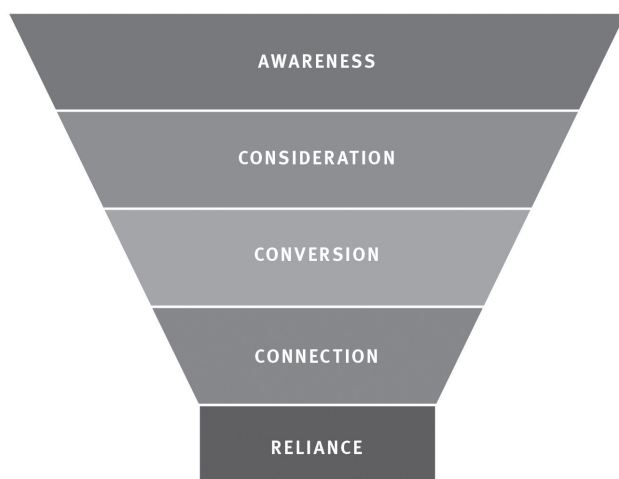
and increasing engagement are objectives for which social media are built and should be measured. However, if an organization strives to go beyond conversion, the decision to re-order the funnel should not be taken lightly.

Aligning the Social Media Funnel to A Smoker's Quit Journey

The following section briefly describes each stage, from awareness through reliance, of the conversion funnel through the lens of the Smokefree Initiative. It provides a model for how the funnel should be conceptualized prior to implementation. When you're using the funnel, we recommend that each stage be measured by more than one KPI. The decision to include specific KPIs should be predicated on your organization and its goals.

1. **Awareness:** The awareness stage aims to reach users who are smokers and are looking for more information about quitting. We believe that these users exist primarily in two environments: social communities and search engines. Awareness metrics measure how many people are finding Smokefree resources. An example KPI for this stage would be organic reach.

2. **Consideration:** The second stage, consideration, is meant to identify users who have found a Smokefree social media account and are beginning to interact with that account, though with little depth. An example KPI for this stage would be website referrals from social media.

3. **Conversion:** In most analytics frameworks, conversion, the third stage of the funnel, is considered the last step. However, quitting smoking is an ongoing process even after the person has smoked his/her last cigarette. Therefore, KPIs were chosen that indicate a concrete action to quit smoking. These actions could also be categorized as self-help actions. A KPI

for this stage would be referrals from the Smokefree.gov website.

4. **Connection:** Smokers who receive social support are more likely to stop smoking. We therefore identified KPIs that indicate a smoker is receiving social support for this fourth stage of the funnel. Social support could occur through peer-to-peer social media interaction or meaningful engagement with the social media account itself. An example KPI for this stage would be community connectedness.

5. **Reliance:** Finally, we understand that reliance is an important step in the smoking-cessation process. Users will need help along the way and will want to reconnect with content that resonated with them. The reliance KPIs measure the program's responsiveness and ability to offer direct help and feedback. An example KPI for this stage would be replies from the administrator of the social media account.

Using Your Social Media Funnel Effectively

Timing the reporting: KPIs for the previous month's data should be collected on the first business day of the month. The time and effort involved in gathering and analyzing these KPIs on a monthly basis will lead to insights that will keep programs performing at a high level in the ever-shifting digital landscape.

It's difficult to step into the shoes of average social media users to understand how they navigate your social media accounts.

Monitoring changes over time: We recommend tracking changes to each KPI over

Steps for Building Your Social Media Funnel

Review the funnel. Confirm that the order of stages in the funnel aligns with your organizational goals. Take on the role of your "typical" social media user and walk through the process he or she would take to move through the funnel. If necessary, talk to stakeholders or examine current user patterns on your platform to inform the funnel order.

Catalog and review metrics. Catalog all the social media and website data you are currently collecting. Work with your team to discuss what KPIs would help you gain understanding of each stage (e.g., organic reach as an indicator of awareness). If no metrics are available to measure a particular stage, discuss if additional tools or insights need to be gathered. Don't forget to look at your website metrics. In some cases, metrics that indicate the interaction between a social media platform and your website may be useful.

Examine your most popular account. Examine your most popular social media account and use that as the basis for selecting final KPIs. For example, your Facebook page may have more activity, more followers and better engagement than your other platforms. Play to your strength and choose comparable metrics for other accounts based on the one that you deem the strongest.

Choose KPIs. Choose KPIs, tie them to each stage and place them in the funnel. Limit yourself to five-six KPIs per stage, as you want this product to be easy-to-digest and scannable. Once again, identify the steps an individual would take in using your social media platforms as you move through each stage of the framework. This check will ensure that each KPI that you select relates to typical user action on your social media account.

time but not doing any sort of year-over-year analysis, as the variables (especially platform changes and network growth) render that analysis useless. Seasonal trends make month-over-month analysis a challenge. Theoretically, KPIs could be adjusted seasonally to make month-over-month changes

meaningful. We recommend using sparklines to show the trend for the past four months. It is the simplest way to track changes to each KPI over time.

Creating a weighted score for each section of the funnel: If you would like to compare sections month to month and sections against one another each month, we recommend developing a model to weight and roll social media metrics into a social media score for each level of the funnel. These compound metrics, supported by the detailed KPIs, would enable you to track each level of the funnel over time so that you can identify areas that need closer attention, make adjustments and ensure that the adjustments are effective.

Conclusion

It's difficult to step into the shoes of average social media users to understand how they navigate your social media accounts. However, this understanding is a crucial step toward gaining meaningful insights that can help optimize your social media outreach and achieve organizational goals. The five-stage conversion funnel is one way to structure your social media data so you can better understand the ways in which users are experiencing your social media accounts. PRN

Brian Keefe is digital strategist at ICF International.

Report and Communicate Social Media Success with 3 Simple Questions

By Blair Broussard

You've successfully pitched your client on integrating social media into its big Q1 campaign. You know this is where the client's target audience lives and that integrating your messaging will likely lead to an increase in sales, lead generation and direct impact on overall ROI. This all sounds amazing to you and your client until the campaign ends and you find yourself scrambling to prove 'this social media thing' actually worked.

Believe it or not (if you are in the industry, you probably do believe it), even the most successful CMOs still haven't completely bought into the power and direct impact of social media marketing. Media Bistro reports that about half of the average consumer's media time is spent on digital, while only 30.5 percent of ad dollars are spent there. A *Fast Company* poll reports that 88 percent of 750 surveyed marketing professionals didn't feel they could accurately measure the effectiveness of their social media campaigns; 52 percent felt dealing with social media ROI was their biggest frustration.

Traditional public relations is not dead. It has just evolved.

Unfortunately, there is no one-size-fits-all formula that showcases and effectively com-municates your social media marketing successes. Answering three questions, however, will provide the framework you need to give clients a one-of-a-kind, in-depth integrated communications report that communicates your wins.

What Can Social Media Do For the Bottom Line?

In the simplest terms, social media marketing can increase ROI on a campaign, event, etc. This can be achieved by driving traffic to a website, lead generation through optimized social content or even a dream headline in *The New York Times* scored through simple Twitter pitching. As the age-old saying goes, the sky is the limit. It's up to you to define and understand what the business' bottom line is to determine how social media will help achieve that end-goal. In personal experience utilizing this tool, our agency, **AR|PR**, has been able to increase lead generation for B2B clients and score coverage in top-tier publications for B2C clients.

To quote Marshall McLuhan, "The medium is the message." This certainly holds true for social media marketing. It's important, though, to know where the target audience lives in the social media world. Before you begin, do your research. Understand the demographics of each platform and how it aligns with your goals. Here are helpful hints about the most popular networks:

- **Facebook**: Basically everyone (or at least more than 1 billion) in the world has a profile. Your brand or organization should probably be there, too.
- **Twitter**: The micro-blog often is used as a news-sharing network.
- **Instagram**: The photo-sharing network is growing rapidly and has been adopted by many B2C companies.
- **Pinterest**: While the majority of users are women, the male demographic is increasing slowly. This is a visual network—people engage with photos and product images.
- **Google +**: Not a very active social network in terms of engagement, but Google is king and this channel can boost SEO.
- **LinkedIn**: Great B2B marketing tool, sales tool, recruitment and lead generation tool. If you are a professional and lack a LinkedIn profile, you should get one.

You need to make certain that the proper tools are in place to properly gather the clicks, engagements, referrers, etc. once your campaign is complete. Simply put, have your **Google Analytics** and a third-party social platform (e.g. **Hootsuite** or **Sprout Social** to name a couple) set up correctly to track desired activity to and from the website. Have a clear understanding before you launch the campaign about how your social media effort will help achieve these actions.

How Does Social Media Fit Within Your Overall Strategy?

It's important to educate and set expectations during the campaign's planning process. Understanding the overall business strategy is key to your social media campaign's success. Sure, there are many incredibly fun, cutting-edge and creative concepts and ideas that may help your brand be perceived as on-trend, but will it also lend itself to the traditional pieces of your campaign? Traditional public relations is not dead. It has just evolved. Forgetting 'old school' strategies and tactics could be the downfall of your social media campaign. Molding your campaign to reflect the overall strategy and goals of the business is key.

Once you fit your social media campaign into the bigger picture, you will need to define its scope, objectives and goals. Just as you would set clear budgets, goals, objectives and expectations for, say, a television commercial, you should set quantifiable metrics for social media marketing. Knowing the measurable objectives or analytics of your social media network(s) and how they align with your overarching business goals is a must. These are the pillars of being able to report success.

Understand your competitors' social strategy. What are they saying and how are they saying it on each network? This will help you define a benchmark and also help you understand what your consumer likes (or doesn't like) when it comes to social media content. Moreover, it will become part of the success story once you exceed your competitor's visible success. That part of the reporting is sure to impress (a little ego boosting has never hurt anyone).

How Do I Define Social Jargon as It Relates to a Business' Goals and Objectives?

Customer service on social media in lieu of call centers can save companies hundreds of thousands of dollars annually in call-service salaries. If maintaining the quality of a customer service program is one of the main goals of your business, then you can't overlook social media. It should be measured in a

way that's similar to how you would measure customer phone calls and email success.

Another example is increasing sales. Find the metrics that enable you to track sales from social media. Information from an **Adobe** white paper suggests looking at the first click attribution and thinking about a customer's progress in the purchasing cycle as a way to assign a value to your social media channels.

While it's important to integrate your social media goals and objectives into the business' over-arching plan, it's also important to measure the health of each individual social network as a standalone medium to ensure the messages you are pumping out are being received by the targeted audiences. Below are a few of the most common metrics used to measure success in each social media platform.

Facebook

- **Engagement:** Likes, comments, shares and impressions received by each post
- **Steady fan growth:** While an increasing fan base is a good indicator of success, it's important not to place too much emphasis on this metric since you also want to make sure that users following your page are in your target audience and will be receptive to the messaging and marketing initiatives.
- **Traffic source to website:** This is a great measurement to understand brand awareness and point of purchase. If you are correctly representing your brand on Facebook, your traffic should remain high from Facebook to your site.
- **Direct ROI:** If you have an ecommerce platform, tracking direct sales from Facebook is another way to measure success and direct ROI. However, remember that direct purchase is just one measure of

Facebook success. There could be other points that the user visits before purchasing, and he/she could first become aware of your brand or organization via social media.

Twitter

- **Engagement:** Retweets, replies, mentions and favorites of your brand's content
- **Steady fan growth:** While an increasing fan base is a good indicator of success, it's important not to place too much emphasis on this metric since you also want to make sure that users following your page are in your target audience and will be receptive to the messaging and marketing initiatives.
- **Traffic source to website:** Due to the fleeting nature of content on Twitter and the type of content that often is distributed there, Twitter's rank in your traffic can vary depending on your industry and goals and objectives of your Twitter account.
- **Direct ROI:** If you have an ecommerce platform, tracking direct sales from Twitter is another way to measure success and direct ROI. However, remember that direct purchase is not the only measure of Twitter success. There could be other points that the user travels to before purchase.

LinkedIn

- **Engagement:** Likes, comments and post impressions.
- **Leads:** Have you received any business or new recruits from the network? Make sure to always ask where a potential employee, customer or client first heard of you. The answer may surprise you.
- **Traffic source to website:** While this network does not focus on driving traffic to your site, it could drive to the employment

or product section of your site (if applicable).

Pinterest

- **Engagement:** Repins, Likes and comments on your original pins
- **Pins from your website:** Pinterest's analytics dashboard focuses on traffic to and from your website. One feature, "pins from your website," reports the number of Pinterest users who use the "pin it" tool to pin images from your website onto Pinterest. This is a great form of advertising for you that is completely out of your hands. To ensure success with this metric, be certain images on your website actually are pinnable and contain the traits of pinnable images, listed above.
- **Traffic to your website:** A good measure of the pins on your board is the amount of traffic from your Pinterest account to your website. This can help you tweak your Pinterest strategy as you continue to build a follower base.
- **Direct ROI:** Pinterest is a huge ecommerce sales tool, with reported spending of $140-

$180 per average checkout, compared to the average $40-$80 on other social sites.

Google+

- Since Google created the social media network, the way in which it's set up allows for better communication between the network and search engine, collecting more optimized and richer data than other social media sites.
  - Posts are crawled and indexed by Google search immediately.
  - Unlike Facebook or Twitter, each post you make in Google+ has most of the characteristics of a full-blown blog posting.
  - The social media network enriches the Google data from users, allowing search engines to be more accurate. In other words, Google+ captures data for Google and determines what will be prominent in searches. **PRN**

Blair Broussard is vice president of AR|PR.