

HOW TO DEVELOP A SOCIAL MEDIA **STRATEGY** A STEP-BY-STEP GUIDE

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Introduction

Many companies continue to struggle with social media and its success. Some don't know how to get started, and others who've been using it for a while still don't know how to define that success. This is true of companies of all sizes, from Fortune 500 companies to the Cuban street food vendor in front of your building.

One of the best ways to ensure social media success is to develop a strategy that lays out clear goals and objectives. When everyone agrees that this strategy is sound, it becomes easier to ask for and get support for the necessary activities.

If you do a Google search for "social media strategy," like we did, you find millions of results from research-based thought leadership ([Harvard Business Review](#)) to popular social media blogs ([Convince & Convert](#) and [Social Media Examiner](#)). You may have even found this ebook through that search. And we're glad you did.

Rather than focus on lofty platitudes about social media, this step-by-step guide will show the how-tos for creating a social media strategy. Developing your own strategy based on our advice will get you well on the way to social media success.

For each chapter, we've created two or three **Action Items** to get you going. Flip to the end of this ebook for a **Social Media Strategy Worksheet** you can fill out as you go along.

Step 1 / Set Goals and Objectives

A solid strategy begins with goals and objectives. While social media can be used for ad-hoc campaigns with simple objectives, let's focus on higher-level business goals.

Many companies are aiming to increase sales by acquiring and retaining customers, or improving brand awareness as measured by marketing surveys. Others look at reducing costs by making their marketing more efficient, streamlining customer service or improving their customer satisfaction scores. These are the types of business goals that you should ladder up to when developing your social media goals.

With some of these higher-level business goals in mind, what do social media goals look like? You can increase the number of leads, and ultimately sales, that come through social media. This can be a big long-term goal, but it is the holy grail of many companies. Since you are frequently starting at zero, it is easy to show progress, but be sure to set realistic expectations, both in timeframe and results, so your management is not disappointed.

Tactical activities like increasing your Twitter followers or getting more people to like your Facebook page are not in themselves useful social media goals. Yes, these audience and reach-building efforts are important and should be tracked, but should not be the focus of your social media activities.

Your higher-level goals can be supported by SMART objectives so that you can properly track your progress in meeting your goals:

- **Specific:** Describe your objectives specific to the results you want. Go deeper than “increase brand awareness” to “increase brand awareness by 10% in the next six months via a targeted social media campaign.”
- **Measurable:** You want to use these metrics in the review process to see if you were effective. Having a specific objective will clearly show whether results were met.
- **Achievable:** Often “100% customer satisfaction” isn't realistic. Your goal of 90% customer satisfaction may be more plausible so consider what's feasible when setting your objectives.
- **Realistic:** Ensure you have the resources, tools and staffing to meet your objectives, or you'll just frustrate yourself.
- **Timed:** Get specific with your objectives and incorporate a time frame. This makes them real and tangible.

And make sure everyone agrees on what success looks like in meeting these goals. If, for example, you were focused on brand awareness, make sure you understand how your social media measurements relate to your traditional measurements and how they both move. Depending on how you are measuring the social component, you may have more impact on moving that number than the traditional metric.

Action Items

1. List your company goals.
2. Develop social media goals to roll up to company goals.

Step 2 / Determine Your Metrics

The most important part of developing your strategy is determining how you are going to measure your success. Halfway through the marathon is no time to wonder how you'll know if you've crossed the finish line. Establish your measurements right after you create your goals.

If you are trying to increase the number of customer service interactions you have by social media, for example, start by establishing a baseline for what that looks like now.

Tie your metrics to your business goals, otherwise you'll waste time pursuing numbers that don't really matter. Here are some examples of business goals linked to appropriate metrics:

If your business goal is to then you should measure ...
Generate leads	Number of leads generated through social media.
Increase customer satisfaction	Positive sentiment around your company and brand.
Lower customer service costs	Number of incidents resolved through social media.
Improve product quality	Share of voice
Improve your brand's awareness	Number of product-related issues posted.

Looking for detailed guidance on how to build out your social media metrics? Download our ebook [5 Steps to Effective Social Media Measurement](#). It includes sections on some of the most common social media metrics, including:

- Awareness, attention and reach
- Conversions and sales
- Social media leads
- Cost savings

Action Items

1. List the most relevant metrics to measure your goals.
2. Benchmark each metric so you know the starting point.

Step 3 / Determine Your Audience and Update Your Personas

No matter your goals for social media, you have an audience. If you are focusing on customer acquisition, you will be focused on prospects, and your strategy should reflect that. **Create and name personas** to reflect these prospects.

These can be based on existing personas you use in your traditional marketing, but with the added understanding of their social web activity. If you don't currently approach prospects with personas, this is a good time to develop them. Use information that you know about your customers to build these fully-realized audience members.

If you are using social media for customer service, your audience will be mostly customers, but there will also be prospects and other interested parties.

Another key audience that you need to pay attention to is your advocates. These can be fans and supporters of your company who may never become customers. They may promote your products, share your content, or even respond to inquiries, but are just not in a position to purchase. What do they care about?

Action Items

1. List the audience for your social media efforts.
2. Create or modify existing personas for social media.

Step 4 / Discover the Right Platforms

Part of developing the personas above is understanding what sites your prospects, customers and advocates frequent. These are the social media sites that you should focus your company efforts on. Warning: prepare to be surprised.

Caterpillar began their social media activities by creating a Twitter profile and a Facebook Page and started interacting with their audiences there. They soon discovered more of their customers and prospects spent time on forums and blogs, so they reset their efforts to address the audience on these platforms.

Existing customers are a great source of this information. Your next customer is likely similar to your current customers, so if you understand what social sites they frequent, and get value from, you can focus your activities on those areas.

A small sample size might be all you need. Gather this information from a few brief phone calls or in-person meetings. (While it is beneficial to collect your customers' social media profiles, do not send an email survey to all of your customers asking about their social media activities. That's not very social.)

You can also use a social media monitoring platform to learn where people are talking about your brand, products, and industry.

When looking for industry conversations, don't ignore your competitors. It is very likely that they are also building out their own social media strategy and creating social profiles to support it. Can you learn from them and where they are most active? Join their LinkedIn Group to see what kinds of interaction and engagement happens there.

Action Items

1. Select 5-10 customers and inquire about their social media activities.
2. Conduct your own research to determine which platforms are most important to your customers and prospects.
3. Complete a competitive analysis of your competitors' social media profiles.

Step 5 / Gather Resources and Determine Roles

Even the most brilliant strategy will fall flat without a team with clearly-defined responsibilities. If you already have social media personnel, this is easy.

Assign the relevant and ongoing social media tasks to the appropriate members of the team. If social media is their full-time job, this makes it possible to pile on the activities, but do so within reason. Other marketers or customer service agents can add social media to their daily routine to fill out the team.

When determining who is responsible for what activities, consider the following tasks as part of your social media efforts:

- creating content
- posting updates to social profiles
- discover and curating outside content
- engaging with your community
- monitoring conversations
- analyzing data from conversations
- connecting with internal and external partners

With a good understanding of the kinds of tasks needed, you need to assign these tasks to the right people with the [right skills](#). And don't forget someone needs to bear final responsibility for executing the strategy.

If you will be creating content, someone also needs to oversee that group of activities. Depending on the size of your organization, it could be a [Chief Content Officer](#). They will likely have editors and producers reporting to them as they oversee the creation and curation of content.

And don't forget the community managers to engage with customers, prospects and advocates, as well as the analysts to make sense of it all and report on your success.

You may work in a small organization or even be a marketing team of one. For you to achieve social media success requires a really tight strategy and clear understanding of exactly

what success means. While this can be true for all companies, when you are strapped for resources (people and time), it is more important to focus on the right outcomes.

Action Items

1. List all the appropriate social media activities.
2. List all the potential social practitioners.
3. Match up the activities on list 1 with the practitioners in list 2.

Step 5 / Create Content

An important part of your social media strategy is the creation of content to share with your audience on the appropriate social sites. The kind of content you create is determined by the goals you've determined.

Are you looking to attract new customers? Start with educational content. Do not focus on your products. Help your prospects solve their business problems. Become a trusted resource by providing blog posts, ebooks and webinars.

Not all content needs to be created within marketing. Get product managers and engineers on board with creating content. Provide feedback to show them their time is well spent writing blog posts or shooting videos. This includes sharing data from their posts like social shares or leads generated.

Looking to streamline customer service and reduce costs? You can publish social FAQs as blog posts that are easily findable through search and shareable via social tools. Short videos can do the trick here, too. Gather ideas from your customer service agents and salespeople. They will know the most common product issues if you don't.





To dig much further into creating a content marketing plan, download our ebook [How to Craft a Successful Social Media Content Marketing Plan](#), but for now, start with the action items below as part of your strategy.

Action Items

1. List the content types that will support your goals.
2. Brainstorm some example titles for blog posts and ebooks.
3. List the possible content creators outside marketing.



Have questions? Contact us:

-  www.salesforcemarketingcloud.com
-  marketingcloud@salesforce.com
-  [@marketingcloud](#)
-  1-888-672-3426

SOCIAL STRATEGY WORKSHEET

This worksheet is meant to guide you in the development of your social strategy. (Refer to each step above for more explanation.) Use it to organize your thoughts and make sure everything is included before creating a formal social strategy plan.

Items

Business Goals

- 1.
- 2.
- 3.

Social Media Goals

- 1.
- 2.
- 3.

Social Media Metrics and Benchmarks

- 1.
- 2.
- 3.
- 4.
- 5.

Audience/Personas

- 1.
- 2.
- 3.

Notes

SOCIAL STRATEGY WORKSHEET

Items

Notes

Most Relevant Social Media Platforms

- 1.
- 2.
- 3.
- 4.
- 5.

Tasks and Owners

1. Owning social strategy:
2. Managing content:
3. Creating content:
4. Posting updates to social profiles:
5. Discovering and curating of outside content:
6. Engaging with your community:
7. Monitoring conversations:
8. Analyzing data from conversations:
9. Connecting with internal and external partners:
- 10.
- 11.
- 12.

Types of Content

- 1.
- 2.
- 3.
- 4.
- 5.