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# Social Media Blueprint: A Step-by-Step Plan to Prepare Your Company

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## Introduction

Wholeheartedly embracing social media involves a sea of change in an organization. Social media isn't just a technology that can be bolted onto the traditional way of doing things: it's an entirely new way of relating and doing business.

Good news — it's not just your company that's finding this difficult. The plain truth is that it's just not easy to adapt to the balance of power shifting to the customer, and that the old way of doing things is rapidly fading away.

This ebook will help you get your organization to adopt social media. We'll explain:

- How to sell your boss on the merits of social media
- How to identify and overcome cultural obstacles
- How to get all the stakeholders to work together
- Goals and objectives you must set
- The vital members of a thriving social media team
- Training your company to engage your community — without triggering a lawsuit or social media crisis

## Chapter 1 / Making a Case for Social Media

You get social media and why it's important for your business, but your boss is skeptical. Or maybe you're the boss, and your team doesn't buy in yet. Perhaps you're an agency, wanting to show your clients the importance and significance of social media in their communication initiatives.

You can tell your organization how social media enables you to meet new people, share helpful expertise and establish your online presence as a resource and authority.

You can play the Microsoft Advertising video, "[The Break Up](#)", that shows the changing mindset of consumers and its affect on advertisers. This Salesforce video, "[How to Build a Business Case for Social Media](#)", is another helpful one.

But all of that won't necessarily be enough to sell them.

Consider the internal audience to whom you're selling social media. They're a cast of characters ranging from power tweeters and bloggers to those who struggle to post a Facebook photo. Your challenge is to build a common understanding among all of these people.

Here are some different approaches to try for changing the minds of those social media skeptics.

### What's the Buzz?

Paint a picture for your organization. Showcase the landscape of social media, where your brand fits in, and how your brand is perceived.

**Your Organization:** Is anyone talking about you yet? If so, what are they saying? Reveal if people are talking about you – and if they're not, that's intelligence in itself. If they are, you'll want to know if it's positive, critical, or neutral, as all of those things will frame your approach to selling in social media.

**Your Industry:** Unveil the general industry conversations for your organization. It's not about you, but how you fit into the larger profile of your industry on the social web.

**Your Competitors:** The social web has opened up a wealth of competitive data. For your known competition, see if they have an established presence in social media. Observe the campaigns and promotions they're doing and how the audience is responding. Having your competitors beating you to the starting line can be a powerful motivator to get started yourself, or show your colleagues why now is the time to start listening and putting together a plan.

People are talking online about your competition. Who they are hiring, who has recently left and where the competition is missing the boat – which presents all sorts of opportunities for you. Social can pinpoint emerging crises or buzz swells that you might want to be aware of for your own purposes.

Remember, the same unfiltered, fast-moving and open information that's out there about THEM, is out there about YOU. It can be awfully worthwhile to share this information internally.

## Demonstrate Value

Perhaps you've completed a social media campaign and you're working on selling your team on another. Or maybe you worked on a successful campaign at a previous job and have it handy as an example. Showing results for your social media efforts can make an impact. For the most complete picture, mix cold hard numbers with human insight.

Don't forget, you want to change people's attitudes and opinions. Show your boss more than superficial things such as number of likes or followers. Instead, choose metrics that relate to your unique goals.

All of these tidbits of information can help demonstrate why you should be participating in social media.

## Chapter 2 / Overcoming Cultural/Company Obstacles

Many factors can combine to ensnare your earnest attempts to turn your company into a social enterprise. Here are some of the common ones, with helpful responses to quiet the critics.

### “Social media is only a passing fad.”

Leadership sees social media as nothing more than the latest short-lived craze; a second dot-com bubble about to burst.

**RESPONSE:** The numbers speak for themselves.

- Twitter has 140 million active users, who collectively post 340 million tweets every day. [\[source\]](#)
- LinkedIn boasts more than 150 million members, including executives from all 2011 Fortune 500 companies. [\[source\]](#)
- Facebook has over 483 million daily active users. [\[source\]](#)
- Every second, an hour of video is uploaded to YouTube. During that same second, users will have watched 1,000 hours of video. [\[source\]](#)

The very fact that almost all your friends and family have Facebook accounts is proof social media is long past the early adopter stage.

### “We are in B2B. Our customers don’t buy multi-million dollar systems on Facebook.”

Social media seems like a natural fit for consumer brands. Soft drinks, movies and fashion have broad appeal, sexy campaigns, and attract impulse buyers. But B2B companies sell expensive, complex products with long sales cycles and multiple points of contact. To some, the very idea of using social media in a B2B context is laughable.

**RESPONSE:** The truth may surprise you. In *The B2B Social Media Book*, Kipp Bodnar and Jeff Cohen argue that B2B has certain advantages at social media that B2C’s lack. B2B companies understand their customers better, have deep subject-matter expertise, are used to finding ways to minimize cost per lead, and already nurture relationship-based sales.

For more on social media for B2B, download our free ebook, [Social Media for B2B: It's Not As Different As You Think](#).

### "We can't control what happens in social media."

Social media is too freewheeling, too messy and too darn unpredictable for many CEOs used to overseeing carefully-crafted press releases and other corporate communications. If they use social media at all, it's only as a broadcasting platform, never a forum for dialogue.

**RESPONSE:** Like it or not, the days when your company controlled its brand are over. The Internet has shifted the balance of power to the consumer. You can't prevent anyone from talking about your brand publicly. You can, however, choose to join the conversation as a respectful partner.

### "We're terrified of precipitating a social media crisis."

Some companies are terrified of an employee (or even an executive) saying something thoughtless on Twitter and triggering an avalanche of protest. To prevent this, employees are either forbidden from engaging in social media on the company's behalf, or straight-jacketed with a restrictive social media policy.

**RESPONSE:** Social media crises happen even to companies who aren't on social media. Your absence is likely to make the crisis worse. Often, opening up Facebook and Twitter accounts the afternoon of some corporate crisis is too late. You need to be engaging with your community now, building trust and earning advocates for when something goes wrong.

Craft contingency plans for when things go wrong. Sit down with Legal, PR, and other stakeholders and work out how to respond to various disasters that could strike. Few companies have regretted an open, transparent, and well-planned response to a social media crisis.

### "Social media is a waste of company time."

Social media, in this view, is seen as a giant temptation to waste hours every day watching cat videos, playing Farmville, and chatting with friends. The simplest way to prevent employees from stealing company time is to forbid any use of social media at the office. The consequences for anyone caught logging into Twitter will be dire.

**RESPONSE:** If you distrust your employees this much, you have bigger issues than social media adoption. Like the Internet itself, social media is a double-edged sword: both a black hole of wasted time and a massive productivity booster.

Wise companies hire the right people and work hard to keep them motivated. Inviting employees to engage with customers is an incredible way to empower them and get them excited about the contributions they can make to the company.

“Social media participation causes us to risk violating legal and compliance guidelines.”

Prompt and human engagement is impossible; anything we tweet or post must be reviewed by Legal. All grassroots attempts to engage with customers are squashed, and official channels are limited to stilted, cautious statements.

**RESPONSE:** Believe it or not, your corporate legal team isn't out there to make your life difficult. They just want to protect you and your company from breaking the law. Respect that, and they'll be on your side. So involve them early in the process. Work with them to develop a formal risk-management process.

They can also help you develop clear guidelines so team members on social media don't inadvertently publish sensitive company information, violate compliance rules, or otherwise expose your company to legal action. We'll explain how to write your own guidelines in Chapter 4.

“We don't have enough people in our organization with the competency to manage and execute a social media plan.”

Using Facebook to share photos with Mom doesn't qualify someone to engage on behalf of the business. How will our employees learn to master this new medium?

**RESPONSE:** You need to build a social media training program for your employees. You must impart more than just the technical know-how required to post on different channels. Your employees need to understand your overall vision of a social business, how to execute your social media playbook, and absorb your social media policy.

We've outlined how to build a training program in our free ebook, *Training Your Company for Social Media*.

## “My VP is demanding hard numbers to justify investing in social media.”

The job of the company’s leadership is to make money and grow the business. Executives will need more than heartwarming anecdotes to justify the time and resources demanded by social media. They need to see hard numbers on how our efforts are improving the bottom line.

**RESPONSE:** You need to demonstrate ROI: return on investment. The formula for ROI is simple:  $(\text{Benefits} - \text{Costs}) / \text{Costs}$ . So if you spent \$100,000 on your social media efforts and received \$250,000 in benefits, then the ROI of your efforts was 150%.

Measuring your costs is easier than measuring the benefits. Choose a metric that reflects your goals. If your goal is to generate more leads, you’ll probably want to measure the value of all lead generation forms filled out as a result of your social media efforts.

For more on ROI, download our free ebook [ROI of Social Media: Myths, Truths and How to Measure](#), written by Dr. Natalie Petouhoff.

## “Half the departments in my company are fighting over control of our social media accounts.”

Marketing, Communications, PR, HR, Sales, Customer Service, IT and others may demand control (or strong influence) over the company’s social media accounts.

**RESPONSE:** It’s not a zero-sum game: almost every aspect of the company can benefit here. That’s why forward-thinking companies are applying social media across the enterprise. Many of them employ a hub-and-spoke model, with a social media team of strategists and community managers in the center that ensure consistency and drive the overall vision while helping multiple business units engage. You’d also be wise to set up a social media council, which we’ll cover in more detail in the next chapter.

## Chapter 3 / Set-up a Social Media Council

One of the most fundamental and effective tactics for a successful social enterprise is the creation of an internal group to guide the adoption and implementation of social media.

A social media council can help you:

- Turn your Legal team from enemy to ally
- Make sure HR doesn't squash your social media strategy
- Identify and share best practices
- Overcome internal objections
- Eliminate duplication of effort
- Speak with a unified voice

Based on our experience with customers and other successful social enterprises, we've identified five steps to creating a social media council. But first, let's talk about what a social media council does.

### The Duties of a Social Media Council

Every organization is different, but in many successful social enterprises, the duties of the social media council include:

- Creating and updating social media policies and guidelines for employees
- Providing clear direction on how employees should integrate their personal social media activities into their professional life
- Approving the creation of new social media channels (and preventing duplication of effort and unnecessary proliferation of pages and accounts)
- Ensuring consistent branding and messaging across all channels
- Identifying, testing and approving third-party tools, such as social media monitoring platforms and social media management tools
- Coordinating the adoption of social media tools with other systems, including customer relationship management and marketing automation (often in conjunction with IT)
- Sharing social media best practices and success stories internally
- Working with Legal, HR and IT to integrate social media policies with existing company policies

- Creating core materials for social media presences and campaigns that can be modified and localized for reuse by other parts of the organization (business units and country offices, for instance)

## Who Leads the Social Media Council?

“Who owns social media” is a pervasive question in enterprise social media. Often, the answer depends on how the company is structured and how they use social media. Ideally, social media adoption is spread out among all departments, who individually control their social media destinies. But the social media council is the best place for everyone to share ideas and facilitate central coordination.

In our experience, the social media council is usually lead by a senior person in PR or Corporate Communications. If the company has a Social Media Director or Manager, that person is often the leader of the council.

**Top tip:** Make sure you have a high-ranking executive sponsor for your social media council. People are much more likely to attend and participate if the first invitation comes from the CEO or CMO.

Now that we know what a social media council does, how do you create one?

## Step One: Bring Everyone Together

In order to be effective, a social media council needs to be inclusive. There are many people inside your organization with a say in how you communicate. Make sure they are represented so that you have a holistic view of your communications (and also so they don't feel left out later and slow down or halt your progress).

A comprehensive social media council will include representatives from:

- PR/Corporate Communications
- Marketing
- Marketing Communications
- Internal Communications
- IT
- Sales
- Customer Service

- Human Resources
- Legal
- Product Management
- Product Development

Every organization is different; your social media council may not include all of these groups, or it may include others not on the list. Be sure to invite anyone who might be able to say, “I have something vital to share with our community” or, “I don’t think we should share that publicly.”

## Step Two: Embrace the Curmudgeons

Don’t be afraid to invite the people who you know or suspect to be resistant to social media adoption or growth inside your company. It’s much better to include them at the beginning and let them see they have a say in the process. Legal teams are often the most cautious about social media, but many a skeptical corporate attorney has had his/her fears assuaged by being part of a carefully-considered planning process.

Plus, your social media council will most likely include enthusiastic early adopters as well as social media curmudgeons. The social media council is the perfect place for the curmudgeons to catch some of the early adopters’ enthusiasm, and for the early adopters to hear and understand the curmudgeons’ often-valid concerns.

## Step Three: Invite the Doers as Well as the Planners

The best way for you to sabotage the success of your social media council is to fill it with the people who make the rules, and ignore the people who do the work. You can’t plan a successful social enterprise in a vacuum: the people who will use the tools and run the campaigns must have a say in the process.

WordPress is one of the best-known and most successful blogging platforms, used by everyone from casual bloggers to major corporations. Yet we’ve talked to more than a few corporate social media practitioners who are using lesser-known, less effective blogging platforms. Why? Because the IT department chose the platform based on their (valid but narrow) criteria, without considering the input of the people who would actually use it.

Make sure the people who will be in the social media trenches every day have their voices heard in your social media council.

## Step Four: Share Best Practices

Even today, with more and more companies becoming successful social enterprises, nagging questions remain:

- What should I tweet?
- How do I separate my personal and professional lives?
- Am I allowed to talk about my company?
- How do I find the time to be active in social media?

Most likely there are people inside your organization who have already answered those questions, and answered them in a way that will make sense to their colleagues. Spread social media adoption and successful social media practice within your organization by sharing the best practices that are working for people inside your organization. The social media council is the ideal place to gather and share those practices.

Let's look at an example experienced by one of our friends at a large company. As Social Media Manager, he was charged with spreading social media adoption inside the company. He was having a hard time making inroads with the sales team. As we all know, sales people are focused on the deal, and rightly so. Getting their attention to try something new requires a special approach.

When our friend found out that one of the senior sales leaders inside the company was getting leads and valuable insight from [Twitter](#) and [LinkedIn](#), he shot a short video of her describing her process. He took the video back to the social media council, who helped him share it in all the internal channels available to them. The result was an avalanche of requests from sales people for more information about using Twitter and LinkedIn.

If your social media council is made up of a representative group from inside your organization, it is the ideal mechanism for sharing best practices that will be understandable and useful to your employees.

## Step Five: Communicate Your Success

Many companies are participating in social media because they feel they have to be there, even though they aren't doing the work to calculate the ROI. This can create a dangerous situation for the people flying the social media flag; no one wants to be in the department that can't define its value.

The social media council can help by sharing success stories that exemplify the value of social media. Did Sales land a big contract because of a connection made through social media? Share the story internally in every channel available to you. Has HR improved the quality of candidates and reduced recruiting expenditures by using LinkedIn? Write it up and post it on the company intranet. Has customer satisfaction increased because the customer service team is using Twitter? Tell everybody about it at your next employee meeting.

Again, the social media council is the ideal place to gather company-wide success stories and share them, ensuring that the hard work of social media adoption—and the valuable information and knowledge gained in the process—benefits everyone in the company.

## Chapter 4 / Get Started

### Set Goals and Objectives

Good hunting dogs are trained to ignore all scents but one: the game the hunter's pursuing. You need the same discipline, because social media is filled with many false trails. Set clear goals and objectives, and stick to them doggedly.

Tie your social media goals to your business goals. Collecting more Facebook likes or Twitter followers doesn't count. Instead, look at things like driving leads in the pipeline, reducing customer service costs, or improving customer retention and loyalty.

Make sure all the important people buy into your social media goals. That means, at the very least, the executive team and the social media council. Having goals that everyone signs off on means you can appeal to them when someone wants you to veer off track. For example when a VP drops by your desk asking you to spend the next quarter fulfilling some odd whim, you can politely remind her of your mutually-agreed goals.

For more on setting and measuring goals, check out our recent ebook, *ROI of Social Media: Myths, Truths and How To Measure*.

### Build a Social Media Team

Your social media team should have three key roles. You'll have to decide whether it makes more sense to train from within or hire from without. Jeff Cohen shares the benefits of each approach in his post, "[Build or Buy to Start a Social Media Team](#)."

1. The **Social Media Manager** owns the social media initiative. This person is responsible for executing the social media goals set by senior leadership. He controls the budget, hires the right people, and makes the tactical decisions whenever needed in the rapidly-changing world of social media.
2. Your **Community Managers** will be the face and voice of your brand, out on the front lines of Twitter and Facebook. They'll be spreading your content, communicating with your community, reaching out to influencers, answering questions, and dealing with complaints. They'll also be the first responders in a crisis. Select people with good judgment, exceptional social skills, humor and initiative.

3. Behind the scenes should be one or more **Social Strategists**. They'll be the ones measuring and analyzing your social media efforts, tracking how you're doing against your objectives, and suggesting more effective ways to engage. They make sure you're not only participating in social media, but actively learning and growing from your experiences. Hire people with a head for numbers, reasoning skills, and business experience.

## Craft A Social Media Policy

If you don't have a social media policy, you're inviting disaster. You must set rules and guidelines so employees can be confident about engaging, without being fearful of doing lasting damage to your brand.

Chris Barger, former director of social media for General Motors and author of *The Social Media Strategist*, joined us [in a recent webinar to explain](#), among other things, the essential elements of a social media policy. These include:

- A statement that the organization's broader ethical guidelines also apply to social media
- Reminders of individual responsibility and liability
- Reminder that employees must post disclaimers that they do not speak for the organization
- Disclosure of affiliation with the organization when posting
- Respect for copyright and fair use laws
- Honoring the confidentiality of proprietary or internal information
- Prohibitions on hate speech, ethnic slurs, etc
- Privacy and discretion reminders

[Dell has published their social media policy](#), and it's a model of a short, clear policy that covers the essential bases.

Your corporate lawyer is your friend here. Bring her in to help draft the policy. Make sure everyone is aware and has bought into the policy before they begin posting.

## Write an Engagement Playbook

Leaping in without a plan may feel more authentic, but you'll either be overwhelmed by the volume of conversations, frozen by situations you hadn't anticipated, or, worst of all, ignite a social media controversy with an ill-considered response.

You need an engagement playbook to adequately care for your community. ([We've published our own](#); please borrow whatever's useful.) Your playbook should cover:

- How to classify conversations and posts you encounter
- Which ones to respond to — and which ones to ignore
- How team members get assigned posts
- The escalation process for critical posts

## Train the Company

Anyone in your company from Customer Service to Product Marketing may be using social media to engage with your community. They need to be trained. Knowing how to invite your Facebook friends to your birthday party or how to post [a bacon cupcake on Pinterest](#) doesn't mean you understand the nuances of social media in the corporate world.

Introductory training will answer basic questions, such as:

- What is social media?
- Why does social media matter (to me personally, and to this company)?
- How do I use social media?
- What is our social media policy?
- How do I engage with our community?

More advanced training should cover topics such as:

- How different departments use social media
- The company's overall social media strategy
- What it means to be a social business
- Dealing with a social media crisis
- Long-term relationship management
- Community management
- Internal collaboration using social networks

Download our free ebook, [Training Your Company for Social Media](#), for detailed advice on building your own training program.

## Conclusion

Make no mistake, championing social media in a large organization will require patience and perseverance. You'll need to be realistic about how fast your company can change and be understanding of those with concerns and questions.

Social media is worth that effort. You're helping your organization embrace the new realities of business in the era of customer connectedness and empowerment.

We're confident that if you follow our advice in this ebook and keep pressing forward, your community will reward you with their business, loyalty and advocacy.

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