

Social Media Certification Workbook

A Beginner's Guide to Applying
Social Media to **Your Business**

HubSpot
Academy



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Introduction

The Ever-Changing Social Media Landscape

Welcome to the Social Media Certification workbook. You're about to start an exciting journey to transform your understanding and approach to social media marketing.

Today's digital revolution has fundamentally changed how people gather and consume information. Gone are the days when consumers had to rely on companies to tell them what to buy and what to think about their products or services. Consumers instead prefer to discover relevant information on their own and through trusted friends or resources. Most importantly, they prefer to do so at a time and place most convenient to them.

This shift in consumer culture and behavior demands a fundamental change in how companies approach social media. Social media is much more than posting and sharing your content while praying that it goes viral. Instead, it's a strategic marketing tool to help you build human connections with your customers and reach your business goals.

When used strategically, social media is the ultimate way to practice inbound marketing. Because of its unique nature as both a public and one-on-one medium, social media has the potential to shape public conversations and perceptions, build brand awareness and loyalty, attract partners and customers, and create brand evangelists.

The Social Media Certification online course will help you accomplish all of the aforementioned goals by equipping you with a solid understanding of social media strategy, digital advertising, social monitoring and listening, influencer marketing, content strategy, and much more.

What Will You Learn in This Workbook?

This workbook includes additional readings and activities that will help you digest the information covered in each section of HubSpot's free Social Media Certification course. The content in the workbook runs parallel to the video course series. In addition, within each section of the workbook, there are links that guide you to the original course content. The content in the workbook together with the online course will solidify your understanding of social media.

This workbook was developed by Dr. Ai Addyson-Zhang ([@AiAddysonZhang](#)), associate professor of Communication Studies at Stockton University, with HubSpot social media professor, Crystal King ([@Crystallyn](#)), to accompany the HubSpot Academy Social Media Certification. Feel free to reach out to us with any questions.

Please keep this workbook handy as you go through the online course. Now, let's get started.

**** Please save this workbook to the desktop on your computer.**

This way your progress will be saved correctly as you complete each section. **

1

Section 1

Developing a Social Media Strategy

Why does your business need a social media promotion strategy?

You've probably heard the phrase, "fail to plan; plan to fail." Strategic planning is the root of successful social media marketing. Be sure you have a solid foundation in place before you start your social media marketing efforts. The first step is understanding who your target audience is and creating a buyer persona.

Equally important is understanding your overall business goals and objectives and having your social media goals and key performance indicators (KPIs) aligned to your overall business goals. Too many social media marketers jump into the content creation game without any understanding of their customers, business goals, and social media KPIs.

Luckily, you won't make the same mistake because you're here taking this course. The readings and activities below will help you practice creating a buyer persona and identifying social media KPIs based on your business goals and objectives.



Reading: Buyer Personas

Learn more Buyer Personas by reading:

- [Create Buyer Personas for Your Business](#)

This article includes a free downloadable ebook and buyer persona templates.



Activity 1: Buyer Personas

Regardless of what business or industry you're in, understanding your customers is crucial. Creating a buyer persona is the first step to understanding your audience and serving them effectively. Use this [free template](#) to create a buyer persona for your business.

Please note that depending on your business, you may have as few as one or two personas or as many as 10 or 20. For the purpose of this activity, consider your *primary* buyer persona.

If you're having a hard time developing a persona for your business, try this free [MakeMyPersona tool](#) or read this [list of 20 questions](#) to get started on developing a buyer persona for your business.

In the box below, summarize your primary buyer persona's background (job, career path, family).

In the box below, summarize your primary buyer persona's *demographics* (gender, age, income, location).

In the box below, summarize your primary buyer persona's *identifiers* (demeanor, communication preferences).

In the box below, summarize your primary buyer persona's *goals* (primary and secondary).

In the box below, summarize your primary buyer persona's *challenges* (primary and secondary).

If you need more information on this, check out video one of the Developing a Social Media Strategy lesson in the video: "[Why You Need a Social Media Strategy](#)" at timestamp 1:54.



Activity 2: Developing KPIs

With a buyer persona in place, you've developed a deeper understanding of your ideal customers. Now, it's time to map out the KPIs so you can measure the effectiveness of your social media strategy and activities.

There are four categories of social media KPIs:

- Reach
- Engagement
- Return on investment (ROI)
- Retention and loyalty

In the box below, identify the KPIs that you'll focus on in your social media strategy. As you develop your KPIs, keep in mind your overall business goals and objectives, and think about how your social media efforts can move you closer to accomplishing those goals.

If you need more information on this, check out the Developing a Social Media Strategy lesson in the beginning of the video: "[Building the foundation for success-setting social KPIs.](#)"

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Section 2

Social Media Listening and Monitoring

Why do brands, organizations, and professionals alike need to invest time and money in social media listening and monitoring?

Social media is a two-way communication channel. It's not merely about promoting and sharing your own content, products, or services, but also about listening and monitoring what other people are saying about you. Research has shown that becoming a smart social media listener can help improve your business performance in tangible ways. Read [here](#) and [here](#) to see how several brands have benefited from practicing social listening and monitoring.

In this section, we'll review readings and activities to help you practice social media listening and monitoring.

Let's get started.



Reading: Social Listening

Learn more about what the importance of social listening by reading:

- [The Complete Social Listening Guide](#)
- [What is Social Listening & Why is it Important?](#)



Activity 1: Social Listening

As social media marketers, we sometimes forget how it feels to be a customer. You probably have heard the saying, "think like a human, not a marketer." This activity on social listening aims to put you into the shoes of everyday consumers and remind you of how it feels to be a happy or frustrated customer.

As you do the activity, please make sure that you understand the differences between social listening and social monitoring. Social listening is "how you track, analyze, and respond to conversations across the internet." Keep that definition in mind as you examine how well brands are listening to their customers or prospects online.

Choose two brands (Brand A & Brand B) in the same industry. It can be your industry, an industry of interest to you, or products or services that you're currently using. Then, identify the social media platforms where these two brands have a presence, and engage with them on each of those channels. Maybe it's a tweet, a mention on Instagram, or a shoutout on Facebook.

Next, depending on how well the brand listens and responds to you, document your sentiment toward each of the two brands on a scale from one to ten, with one being the least favorite and ten being the most favorite. Then explain your reasoning for each score. As you do the activity, take notes on the brands' responses, and reflect on how your sentiment toward the brands changes over time. Share your responses in the following two boxes.

Your sentiment toward Brand A

Your sentiment toward Brand B

If you need more information on sentiment, check out the first video of the [Social Media Listening and Monitoring lesson](#) at timestamp 1:15.



Activity 2: Social Listening

Activity 2 focuses on social monitoring. Again, make sure that you understand the differences between social listening and social monitoring. Unlike social listening, social monitoring demands a more proactive approach. You're actively looking for "mentions and conversations that pertain to your brand, your products, your hashtags, your employees, your competitors, and your customers." In other words, when you're practicing social monitoring, you're measuring the broader context within which your business operates. Its scope goes way beyond your immediate business.

Please conduct a social monitoring of your brand by completing the following on a *daily* basis for a period of *five days*.

- Set up Google Alerts to receive email notifications when an article is published about a topic that your buyer persona cares about or is related to your industry.
 - Click [here](#) if you don't know how to set up Google Alerts.
- Use TweetDeck to monitor phrases, brands, hashtags, and people that are relevant to your business and your persona cares about on Twitter.
 - Click [here](#) if you don't know how to use TweetDeck.
- Save a Facebook search in your browser on a topic related to your industry and that your persona cares about.
- On Instagram, use [Keyhole](#) to monitor a hashtag of interest to your industry and persona. Or manually conduct the hashtag search on your mobile device.

In the following four boxes, document any insights and takeaways that you've gained from practicing social monitoring on a daily basis for five days.

By setting up Google Alerts and monitoring email notifications for five days, I've noticed/learned:

By setting up a TweetDeck dashboard and monitoring it for five days, I've noticed/learned:

By saving a Facebook search and monitoring it for five days, I've noticed/learned:

By using [Keyhole](#) (or by doing so manually) to monitor a hashtag on Instagram for five days, I've noticed/learned:

If you need more information on this, check out video three of the Social Media Listening and Monitoring lesson in the video: "[Understanding Brand Conversation](#)" at timestamp 4:19.



Activity 2: The Benefits of Social Listening and Social Monitoring

Activity 1 and 2 that you just completed should have given you a good understanding of social listening and social monitoring. Both social listening and social monitoring have tangible benefits to a brand's health and growth. In the boxes below, document any benefits that you've experienced or observed, from the brand's perspective, and by practicing social listening and monitoring. If applicable, include potential benefits that the brand has missed.

To refresh your memory, below are the eight benefits of social listening:

- Help measure the performance of one's social media, web, conversations and offline strategy
- Help manage your reputation
- Identify biggest fans and influencers
- Discover new product ideas or ways to enhance features on existing products
- Watch the competition
- Lead to new business opportunities
- Find leads
- Develop strategic benchmarks for future business development

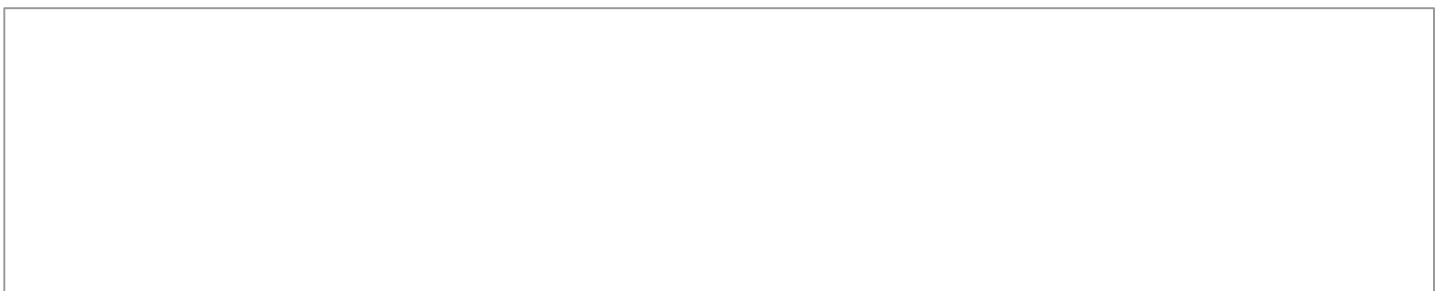
Benefits from practicing *social listening*:



Here are some major benefits of social monitoring:

- Put you and your target buyer persona in the audience together
- Gain market intelligence and insights
- Track links to your website on social media, engagement from campaigns, and the sentiment and performance of your marketing campaigns
- Boost recruiting efforts

Benefits from *social monitoring*:



If you need more information on this, check out the video “The power of social listening” at the 1:45 and the video “[Watching the competition](#)” at timestamp 1:11 in the Social Media Listening and Monitoring lesson in the Social Media Marketing Certification.

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Section 3

Building a Content Strategy For Social Media

Why is a solid content strategy so crucial?

The heart of social media is content. Without quality content, social media has little appeal. It's paramount that brands and businesses understand what type(s) of content they should provide to their customers to achieve the reach and engagement they're looking for.

There are three main reasons people use social media:

- To be *informed*
- To be *entertained*
- To be *connected*

To decide which type of content you want to produce, you need to have a solid understanding of your audience. You want to identify which type of content resonates the most with your audience and offers your audience the most value. In this way, your audience is more likely to interact with you on that piece of content.

Let's practice how you can strategize your social media content so that your efforts can be optimized to deliver the business results that you want.



Reading 1: Content Marketing

Read Julia McCoy's story about how adopting an effective content strategy has helped grow her business from \$29K to \$129k monthly gross income. Julia's case demonstrates the importance of understanding one's audience, producing content that resonates with the audience, and developing a solid content strategy behind one's content creation. A recent Forbes article offers more details on Julia's success and content strategies.

Learn more by reading:

- [How to Attract \\$4 Million in Client Revenue Through Content Marketing.](#)



Activity 1: Content Marketing

Before you jump into content creation, you'll need to first understand what type of content resonates the most with your audience and on which social media channels. This requires you to conduct a "content audit." As described in the lesson, you'll need to create a spreadsheet to organize and record how well your content has been performing on multiple social media channels.

Next, write down the top-performing posts for each social media channel in the following boxes. Read [this list of content formats](#), such as video, image, guides, surveys, etc. Please also specify if your content can help your audience stay *informed*, *entertained*, or *connected*.

Top-performing posts and content type on Facebook:

Top-performing posts and content type on Twitter:

Top-performing posts and content type on Instagram:

Top-performing posts and content type on LinkedIn:

Top-performing posts and content type on other channels:

If you need more information on this, check out the beginning of the video "[Developing your strategic content plan](#)" in the Building a Content Strategy for Social Media lesson in the Social Media Certification.



Activity 2: Content Marketing

In the boxes below, write down your content ideas that help inform, entertain, and connect your audience. Remember: You don't need an equal amount of the three types of content—the type of content you produce needs to be driven by your goals and business strategy. Refer to the results of Activity 1, and focus your effort on producing content that resonates most with your audience. Meanwhile, be aware of the resources you have as well as the size of your social media team. If you have limited resources, it's better that you *prioritize* your content creation efforts on the social media channels where your audience is most active.

In the following boxes, generate two ideas for each content creation purpose (be informed, entertained, and connected). Be creative and try to mix up content formats. For example, your piece of content can be in any format such as text, visual images, animated GIFs, stories, video, live video, quizzes, surveys, polls, etc.

Learn more about content formats by reading:

- [How to Develop a Content Strategy: A Start-to-Finish Guide](#)

Content idea 1 to **INFORM**:

Content idea 2 to **INFORM**:

Content idea 1 to **ENTERTAIN**:

Content idea 2 to **ENTERTAIN**:

Content idea 1 to **CONNECT**:

Content idea 2 to **CONNECT**:

If you need more information on this, check out the video "[Content - The backbone of your social strategy](#)" at timestamp 0:50 in the Building a Content Strategy for Social Media lesson in the Social Media Certification.



Reading 2: Posting on Social Media

Learn more about the best time to post on various social media channels by reading:

- [The Best Time to Post on Instagram, Facebook, Twitter, LinkedIn, Pinterest, and Google+](#)
- [What 23 Studies Say About The Best Times To Post On Social Media](#)
- [Best Times to Post on Social Media: 2018 Industry Research](#)



Activity 3: Posting on Social Media

Now that you have all the content on paper, you need to think about the channel for sharing that content—which day, at what time, and which channel you'll use so that it reaches the right audience and enhances the likelihood of having your audience engage with your work.

Please use these [free templates](#) (multiple templates for various social media sites) to create a social media content calendar for your business.

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Section 4

Extending Your Reach on Social Media

Why do you want to extend your reach?

According to Mark Schaefer, a globally renowned social media marketer, "[The economic value of content that is not seen and shared is zero.](#)" As social media marketers, you want your message to travel to as many people and places as possible. The more exposure your message has, the more likely it will attract potential customers.

But, how can you get your message to travel beyond your organization's immediate network?

Two popular methods for extending the reach of social messaging are influencer marketing and soliciting user-generated content.

Let's put these ideas into practice.



Reading: Influencer Marketing

Learn more about influencer marketing by reading:

- [10 Influencer Marketing Campaigns to Inspire and Get You Started with Your Own](#)



Activity 1: Influencer Marketing

Find an existing piece of your content that is of great value to your audience but is not performing as well as you wished. This can be in any format, such as blog post, ebook, white paper, video, live video, infographic, etc.

Based on the content you've selected, identify three influencers in the following six categories. Keep in mind that finding influencers to work with is not merely about your products, services, or content; instead, it should be pursued as a mutually beneficial relationship. For now, just brainstorm potential influencers—get some initial ideas going. You'll narrow down this list in the next activity.

Below are the six categories of influencers:

- Celebrity influencers
- Industry influencers
- Journalists and media personalities
- Content creators
- Micro-influencers
- Local influencers

Three names of celebrity influencers:

Three names of industry influencers:

Three names of journalists and media personalities:

Three names of content creators:

Three names of micro-influencers:

Three names of local influencers:

If you need more information on this, check out the video "[The varying shades of influencer marketing](#)" at timestamp 1:35 in the Extending Your Reach on Social Media lesson in the Social Media Certification.



Activity 2: Influencer Marketing

Narrow down the influencers you've identified in Activity 1, and select the right ones that make the most sense to your brand, business, and content type. As you do this, keep in mind your business

and campaign goals as well as your available resources such as time and budget. You want to select influencers who can impact the opinions and behavior of an audience with the potential to become your paying customers.

There are three factors that can help you select the right influencer, which are listed below. As you go through the 3Rs, please also think about how you plan to work with these influencers.

- Reach (the ability to deliver content to a target audience)
- Relevance (the strength of connection to a brand or topic)
- Resonance (the ability to drive a desired behavior from an audience)

Here's a tip. For each influencer, you can create a Low, Medium, and High score based on the three R's. The influencers who score the highest on the three criteria are the ones you should consider working with.

Celebrity influencers:

Industry influencers:

Journalists and media personalities:

Content creators:

Micro-influencers:

Local influencers:

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If you need more information on this, check out the video "[How to work with influencers](#)" at timestamp 0:28 in the Extending Your Reach on Social Media lesson in the Social Media Certification.

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Section 5

Using Social Media to Build One-to-One Relationships

Social media goes far beyond a broadcasting channel whose sole goal is to push out your own content. In fact, because of its unique nature of allowing direct communication with your audience, social media is an effective channel to build meaningful one-to-one relationships.

But, how can you leverage social media to develop such quality human connections?

There are several tactics you can employ to bring your relationships with your customers to the next level, such as:

- Respond to comments
- Use humor
- Offer additional value
- Ask for reviews
- Ask for product comments
- Conduct polls
- Respond to comments in real time
- Tag guests
- Reference others' content
- Create Facebook or LinkedIn groups
- Ask questions and respond to answers
- Use emojis
- Use videos

Let's practice how you can apply these tactics to develop deeper connections.



Reading: Relationship Marketing

Learn more about the importance of "relationship marketing" and "customer experience" by reading:

- [How to Improve Your Relationship Marketing](#)
- [How To Identify The Customer Experiences That Will Get Amplified In Social Media.](#)



Activity 1: Building Deeper Connections Based on Social Listening

In Section 2 of this Social Media Certification course, we discussed social listening and monitoring. Activities in the current section (Section 5) go hand in hand with your social listening skills. In fact, building meaningful connections on social media cannot happen without you being a good listener first. Listening helps you succeed in cultivating deeper digital connections.

This activity has two parts. First, identify all social media channels where your business has a presence. Use any of the free tools or built-in analytics on those respective social platforms to practice active social listening. Observe the comments and interactions between your brand and your audience while thinking about the following questions:

- Does your audience ask lots of questions? Are there any patterns you observe? Do you always answer and respond to your customers' questions? How about negative comments or customer complaints, do you answer them?
- Do you have superfans who engage with your brand consistently? Are you thanking them and interacting with them regularly? Where do your superfans hang out?

Second, in the box below, brainstorm ideas for content that can help address some of your audience's concerns or issues. It can be as simple as responding to their questions or direct them to additional resources. After you perform this activity, record whether and how your effort has helped further your connection with your customer.

Likewise, in the box below, brainstorm ideas for personalized content you can use to surprise or delight your super fans or loyal customers ([see an example of how a produce company surprises and delights their customer](#)). After you perform this activity, record whether and how your initiative has helped deepen your relationships with your fans.

If you need more information on this, check out the video "[1:1 engagement: getting started](#)" at timestamp 4:07 in the lesson Using Social Media to Build One-to-One Relationships in the Social Media Certification.



Activity 2: Getting to Know Your Followers

Every day, you probably gain new followers on various social channels such as Facebook, Twitter, Instagram, LinkedIn, or Snapchat. How much time do you actually spend studying the interests or background of each of your new followers and identifying those who are relevant to your business to cultivate deeper connections?

For this activity, practice intentional relationship building. For the next dozen new followers that you gain on each of your social media channels,

1. Examine their backgrounds and interests.
2. Select those of relevance to your business and engage with them by using any of the tactics discussed in Section 5, such as offering additional value, conducting polls, seeking feedback, or using GIFs, humor, or short videos to connect.

In the boxes below, document the tactics you used to better connect with your followers and what outcomes you've achieved.

On Facebook, I cultivated deeper connections with _____ (number) new followers. Here are the tactics I employed to engage with them and the outcomes I've achieved:

On Twitter, I cultivated deeper connections with _____ (number) new followers. Here are the tactics I employed to engage with them and the outcomes I've achieved:

On Instagram, I cultivated deeper connections with _____(number) new followers. Here are the tactics I employed to engage with them and the outcomes I've achieved:

On LinkedIn, I cultivated deeper connections with _____(number) new followers. Here are the tactics I employed to engage with them and the outcomes I've achieved:

On this _____ social media channel, I cultivated deeper connections with _____ (number) new followers. Here are the tactics I employed to engage with them and the outcomes I've achieved.

If you need more information on this, check out the video [Using Social Media to Build One-to-One Relationships](#) at timestamp 4:07 in the Social Media Certification.



Activity 3

For Activity 3, please refer to the list of influencers you identified in Activity 2 within Section 4.

Interact with these influencers on a daily basis to build one-to-one connections. You can do so by engaging with and sharing their content, contributing to their discussions, or use any other engagement tactics and strategies discussed in section 5.

Engage with these influencers over an extended period of time and document any tangible results you've achieved along the way. Did you get any of your influencers' attention? Did you manage to cultivate any deeper connections? Is there any potential collaboration on the horizon? This activity may take some time to complete.

If you're a student, identify and cultivate meaningful relationships with organizations you want to intern or work at, or individual influencers you want to network with in your professional field of interest.

I interacted with _____ number of influencers over _____ number of days on these _____ social media channels. Here are the results I've achieved:

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Section 6

Understanding the Basics of Digital Advertising

Organic reach on social media has significantly decreased. For example, [organic reach on Facebook for an average business has decreased dramatically over the past several years from 26% in 2011 to less than 1 percent in 2017](#). Social media, especially on mature sites such as Facebook, is increasingly pay to play.

Section 6 discusses several ways where digital advertising can be used as an effective content marketing format to amplify a brand's inbound strategy. Unlike traditional ads that tend to be interruptive, digital ads can be highly engaging, useful, and targeted, while bringing value to the intended audience. When implemented successfully, digital ads can help deliver the right content to the right people at the right time, making spending on advertising much more effective.

Let's practice how you can develop the right content and strategy for your digital ads to meet your business goals.



Reading

Learn more about the rapid decline of organic Facebook reach by reading:

- [The Decline of Organic Facebook Reach & How to Adjust to the Algorithm](#)
- [How Your Business Can Survive the 2018 "Facebook Apocalypse."](#)



Activity 1

To ensure the success of your digital ads, you have to understand your target audience. Who should be seeing your ads? Where does your target audience congregate online? What problems or issues does your target audience face? How can your product or service make their lives better? Keep these questions in mind as you develop your digital advertising strategy and content. Also, refer back to the buyer persona that you identified in Activity 1 in the first section of the course, Developing a Social Media Strategy.

Potential prospects typically go through a process of active research before they become paying customers. This process is called the buyer's journey. It includes the following three stages:

- Awareness stage
- Consideration stage
- Decision stage

Keep your buyer persona handy as you complete the following activities, which ask you to develop specific ad content for each stage of the buyer's journey.

AWARENESS stage—buyer’s problem that needs to be solved:

AWARENESS stage—content offer (e.g, blogs, instructional videos) and content that can help increase brand awareness, drive traffic to your website, or establish you as a thought leader:

CONSIDERATION stage—buyer’s specific questions regarding your product/service:

CONSIDERATION stage—content offering (e.g, webinars or case studies) and content that help answer their specific questions:

DECISION stage—additional information a buyer needs to make a final purchase:

DECISION stage—content offering (e.g., free trial, live demo, or coupon) and content that can give them the extra push to become paying customers:

If you need more information on this, check out the video "[Putting your ad strategy in place](#)" at timestamp 3:44 and the criteria outlined in the video "[How to create remarkable ad content](#)" in the Understanding the Basics of Digital Advertisement lesson in the Social Media Certification.



Activity 2

Activity 2 aims to help you consider where you want to place your ad so that you can optimize your time and advertising money. There are many social media platforms where you can place your ads, such as the following:

- Facebook Lead Ads
- Facebook Messenger Ads
- Instagram Ads
- LinkedIn Ads (sponsored content, text ads, and "Inmail")
- Twitter Ads (promoted tweets, promoted accounts, promoted trends)
- Pinterest (promoted pins)
- Snapchat (Snap ads, lenses, and filters)
- YouTube
- Google AdWords

Refer to the ad content that you developed in Activity 1 for each of the three stages in the buyer's journey. In the boxes below, specify the social network you want to use to place your ad and list your reasons.

AWARENESS stage—ad will be placed on the following network, and here's why:

CONSIDERATION stage—ad will be placed on the following network, and here's why:

A large, empty rectangular box with a thin black border, intended for the user to provide details about the network for the consideration stage.

DECISION stage—ad will be placed on the following network, and here's why:

A large, empty rectangular box with a thin black border, intended for the user to provide details about the network for the decision stage.

If you need more information on this, check out the video "[Understanding the network possibilities](#)" at timestamp 0:30 in the Understanding the Basics of Digital Advertisement lesson in the Social Media Certification.



Section 7

Measuring Your Social Return on Investment

Why does measuring social media ROI matter?

One of the recurring challenges facing social media marketers is demonstrating the ROI of their efforts in the context of business goals and objectives. Savvy digital marketers understand that they need to rely on smart benchmarks and metrics to evaluate their work and to demonstrate tangible results.

Let's practice how you can measure your social media ROI smartly and strategically.



Reading: Measuring Social ROI

Learn more about the importance of measuring Social ROI by reading:

- [Social Media - Measuring the ROI](#)
- [7 Ways to Actually Track Social Media ROI](#)



Activity 1: Measuring Social ROI

Conduct a social media audit using this [free template](#).

If you need more information on this, check out the video "[The social media audit](#)" at timestamp 3:02 in the Measuring Your Social Return on Investment lesson in the Social Media Certification.



Activity 2

You may have heard this statement from the famous management consultant, educator, and author, Peter Drucker, "If you cannot measure it, you cannot improve it." Measuring the ROI of your social media efforts is crucial to the existence and performance of a social media team.

Examine a recent social media campaign or initiative your organization has conducted, and calculate its ROI. You can also use this [free tool](#) to calculate your social media ROI.

My business invested \$ _____ dollars in a social media campaign/initiative to accomplish _____ on these social media channels including _____ .

Upon the completion of this social media campaign/initiative, my organization made \$ _____ in profit.

The ROI of this specific social media campaign/initiative is _____ .

However, keep in mind that although revenue is what matters at the end, there can be delays in seeing downstream financial ROI from your social media efforts. Because of this, there are other indicators of success that can lead to increased revenues, such as:

- Sign-ups for email, webinars, and events
- Product downloads and trials
- Purchases
- Downloads of marketing materials
- Visit-to-lead sentiment analysis
- Competitor benchmarking
- Website traffic
- Reach and engagement
- Audience size
- Campaign results

If you need more information on this, check out the video "[How do you measure social ROI](#)" at timestamp 2:41 in the Measuring Your Social Return on Investment in the Social Media Certification.

8

Section 8

Essentials for Continued Success With Social Media

We have reiterated throughout this course that social media is more than simply a mass marketing tool. Although social media is powerful for reaching your audience, it can also quickly amplify negative events for your organization to a very large audience.

There's no shortage of on and offline public relations crises that have occurred for major companies, several of which have gone viral due to social media sharing. Section 8 has shared several such examples.

The activities in this final section are designed to help you prepare your social media strategy for crisis management. Although unexpected factors always occur during a crisis, there are specific actions you can take in advance to get prepared and make sure your organization can respond appropriately and quickly over social media during catastrophic situations.

Let's put these essentials into practice.



Reading 1: Social Media Policy

Learn more about creating social media policies by reviewing:

- [5 Noteworthy Examples of Corporate Social Media Policies](#)
- [The Social Media Policy Template \[+ Download & 5 Examples\]](#)



Activity 1: Social Media Policy

Create a social media policy for your business. If your company already has a social media policy, revisit it based on the suggestions below. Or, if you're an educator teaching a social media course, work with your students to create a social media policy for your class or revise an existing one.

A good social media policy has certain universal elements you should pay attention to:

- Who are your company/class spokespeople?
- How will you address customer/student complaints?
- How will you handle PR inquiries?
- How will you address copyright infringement?
- Do your employees/students understand the social media do's and don'ts?
- Do you have a clear direction on how to respond in conflict situations?
- Have you outlined what information employees/students can or can't share?
- Have you outlined steps employees/students should take to protect their privacy?
- Have you set forth compliance expectations and rules for employees/students if they have questions?

In the box below, create a social media policy for your company/course.

If you need more information on this, check out the video "[Understanding social media governance and risk](#)" at timestamp 5:42 in the Essentials for Continued Success With Social Media lesson in the Social Media Certification.



Reading 2: Social Media Crisis Management

Learn how to create a social media crisis management plan by reviewing:

- [How to Create a Social Media Crisis Management Plan \[Free Template\]](#)



Activity 2: Social Media Crisis Management

No business can avoid crisis, especially in the digital age. The immediate reach of social media platforms can make crises quickly go viral, even if they wouldn't have before social media's prevalence. Video 3 in this section lists several things you have to consider when a real crisis occurs. One of them is having a crisis plan.

When you're creating a crisis plan, there are several essential components to think about:

- Create a good mix of executive personnel to enforce decisions, management to coordinate, and communication experts to craft the message.
- Brainstorm all the potential issues that could arise.
- Assign a risk level based on how much it will affect your company's bottom line.
- Determine which stakeholder will be notified at what risk level.
- Create a list of internal contacts and their titles along with the departments that should get involved.
- Alert the stakeholders using the risk levels you've pre-set.

In the box below, draft a crisis plan.

If you need more information on this, check out the video "[Putting a crisis management plan in place](#)" at timestamp 5:09 in the Essentials for Continued Success With Social Media lesson in the Social Media Certification.



The Results

Your Completed Workbook

Congratulations! You did it. You should feel very proud of yourself for coming this far to complete all the readings and activities in this workshop.

I hope the content in this workbook has helped you digest the concepts in each of the eight sections in the online course and deepened your understanding of social media.

Your next step is to apply the strategies and tactics discussed in the course to improve your own social media efforts and to bring tangible results to your own business. Meanwhile, embrace a forever-student mindset. Social media is constantly changing. New apps and tools emerge and disappear. You have to stay alert to emerging tools, apps, and trends, and identify creative ways to engage with your audience and have them engage with you regarding your content, products, or services. Always remember: Social media is not about you; instead, it's a two-way communication channel that can help you build meaningful relationships, trust, and communities.

Last but not least, let's be social and cultivate some deeper connections. After all, you're earning a social media certification. Please tweet me ([@AiAddysonZhang](https://twitter.com/AiAddysonZhang)), social media professor Crystal King ([@crystallyn](https://twitter.com/crystallyn)) and HubSpot Academy ([@HubSpotAcademy](https://www.hubspot.com/academy)) to share your feedback with us. We always love hearing from you. Your input helps us serve you better. Plus, HubSpot Academy is always looking for exemplar work to showcase in our training materials.

Always be social,

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