

Social Marketing ROAD Map Handbook

A method for mapping an effective
social strategy

Note: This is an authorized excerpt from the full MarketingSherpa Social Marketing ROAD Map Handbook. To download the entire Report, go to: <http://www.sherpastore.com/SocialROADmapHandbook.html> or call 877-895-1717

Social Marketing

ROAD Map Handbook

A method for mapping an effective social media strategy

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DIRECTOR'S NOTE

ON THE ROAD TO SOCIAL MARKETING MATURITY

Social media has created an exciting and challenging world of new possibilities for marketers. Until recently, a vast majority of marketers were exploring this unfamiliar terrain without a compass – or strategy – to guide them. Captivated by the hype and the ease of implementing social sites, many ignored proven marketing principles. They launched their social initiatives by creating blogs, Twitter and Facebook accounts without a plan or a purpose.

But a momentous change in the use of social media for marketing purposes is taking place. Social marketing is maturing to the point where the mainstream is now in transition from the trial-and-error phase of the learning curve to the strategic phase. Marketers are learning to begin their social initiatives by researching the medium and monitoring target audiences to determine realistic objectives. Then and only then do they formulate tactical plans and roll-out the social platforms required by the plan. To help marketers ascend this steep learning curve, they need a practical method for mapping their social media strategy. They need to develop a coherent process for achieving objectives that can be easily and routinely performed. MarketingSherpa's Social Marketing ROAD Map was created to fulfill this need.

Based on the ROAD Map methodology, this handbook is a step-by-step guide to mapping your social marketing strategy. It is loaded with research-based insights on proven practices, hands-on worksheets and checklists, and social marketing case studies featuring the real life successes of marketers like you. It is intentionally "social media brand agnostic", meaning that familiar technology brands like Twitter, Facebook, LinkedIn, etc. are used only when necessary as tactical examples. The purpose of this approach is to help you develop a strategy that will outlive technology brands that are often here today and gone tomorrow.

This ***Social Marketing ROAD Map Handbook*** is designed as a teaching tool – not only for advancing the careers of the self-taught but also for those attending MarketingSherpa's Social Marketing Workshops. These workshops are conducted in small classroom settings by social marketing experts using this handbook as a curriculum guide.

Whether you obtain this handbook separately, packaged with the *2010 Social Media Marketing Benchmark Report* or included with a Social Marketing Workshop, it will help accelerate your progress through the phases of social marketing maturity to achieve social marketing success.

As always, we welcome your comments and look forward to hearing from you.

Regards,



Sergio Balegno, Research Director, MarketingSherpa
@SergioBalegno

SETTING THE STAGE FOR SOCIAL MARKETING

THREE QUESTIONS TO ASK YOURSELF BEFORE GETTING STARTED

1. WHERE ARE YOU NOW?

You are about to begin a journey that requires navigating through uncharted territory. To find the fastest and safest route, you need to know two things: where you are now and where you want to be. The same is true for mapping an effective social marketing strategy. Before getting started, you need to know where you are now in terms of the social marketing maturity lifecycle. The following worksheet will help you determine this by analyzing your progress in four process-related factors critical to social marketing success.

To complete the worksheet, circle one number in each row that corresponds with the column heading that *best describes* the process you use for each tactic. For example, if your organization has a formal, documented process that it routinely performs for gathering intelligence on target audiences, their use of social media and your competition in the space, circle 5 in the first row. If your organization has not begun to formulate a process for this tactic, circle 1. After circling one number in each row, sub-total each column and combine columns for your total score. Matching this score to the phase shown in the bottom row will determine where your organization is now in the social marketing maturity lifecycle.

WORKSHEET: DETERMINING YOUR ORGANIZATION'S PHASE OF SOCIAL MARKETING MATURITY

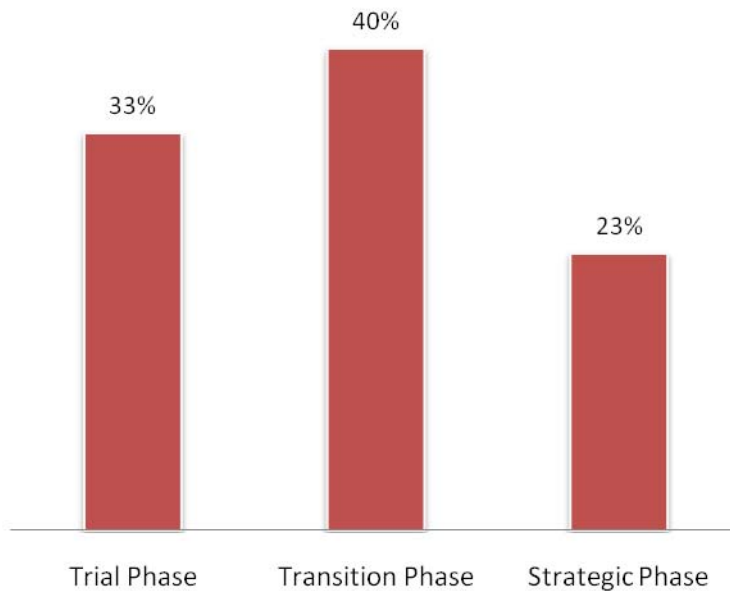
Social Marketing Maturity Process Benchmark	No Process	Informal Process, Randomly Performed	Formal Process, Routinely Performed
Gather intelligence on target audiences, social media use and competition	1	3	5
Define objectives aligned with target audiences and social metrics	1	3	5
Create a social marketing strategy with a tactical plan of action	1	3	5
Select platforms that fit social marketing architecture and tactics.	1	3	5
Sub-Totals			
Total			
Social Marketing Maturity	Trial Phase: 4-6	Transition Phase: 8-16	Strategic Phase: 18-20

Note: If necessary, skip ahead to "The Social Marketing ROAD Map Defined" for a more detailed description of the four factors critical to social marketing success.

HOW YOUR ORGANIZATION STACKS UP AGAINST OTHERS

Once you have completed the worksheet, you will know where you are in the social marketing maturity lifecycle. But it is also important to understand how your organization stacks up against others. Are you lagging behind or taking the lead? The following chart shows the average percentage of organizations in each phase of social marketing maturity based on a survey of more than 2300 marketers.

Chart: Organizations by phase of social marketing maturity



Source / Methodology: MarketingSherpa Social Media Marketing Benchmark Survey / Fielded Nov 2009, N=2,317

2. WHERE DO YOU WANT TO BE?

ARTICULATING A VISION FOR SOCIAL MARKETING SUCCESS

Leading a successful initiative starts with a vision – in this case, a vision for social media marketing success.

A vision for an initiative is an inspirational description of what a leader would like his team to accomplish, not in terms of specific objectives but a mental image that summarizes what success could or should look like. It's the end game. It can give a team direction and insight – steering current and future objectives, strategies and courses of action.

The challenge is to articulate a clear and concise vision the team will understand and buy into. Clarity will allow a team to make decisions based on your vision. And a ring of drama will inspire the team to give the initiative a higher priority.

Sometimes a vision for an initiative is difficult to articulate but you intuitively know that there is one and, with a little brainstorming, it can be described.

For example, the vision for an online publisher's social marketing initiative might look something like this:

Example: A Vision for Social Marketing Success

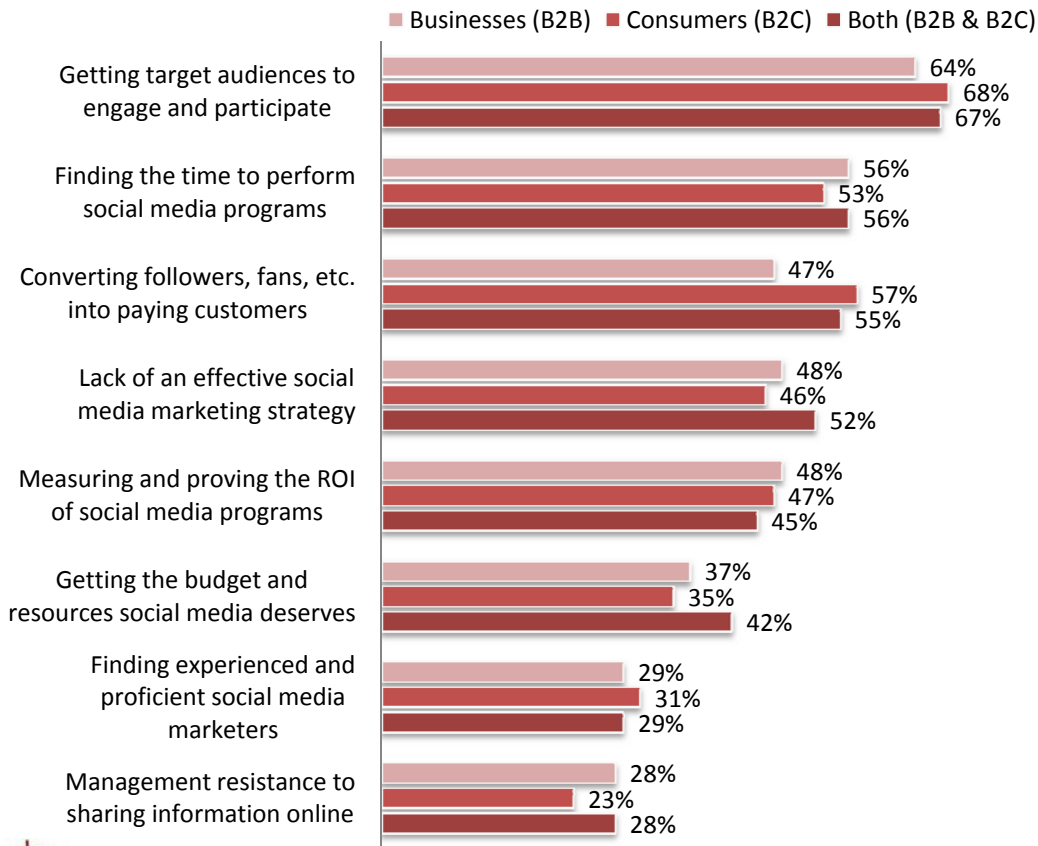
Social media enables us to form and engage communities with common professional interests and challenges. We will develop a compelling social marketing strategy for delivering the insights and know-how members of these communities need. And we will create a compelling persona for interacting with members of these communities in a single, trustworthy voice. As a result, we will be recognized not only as thought-leaders but as innovators in our segment of the online publishing space.

3. HOW WILL YOU GET THERE FROM HERE?

UNDERSTANDING THE CHALLENGES

Fore-warned is fore-armed so be prepared to address these challenges as you proceed through the social marketing planning process. As this chart shows, the challenges to social marketing effectiveness are ranked similarly by marketers in every channel.

Chart: “Very important” challenges to social marketing effectiveness, by primary market

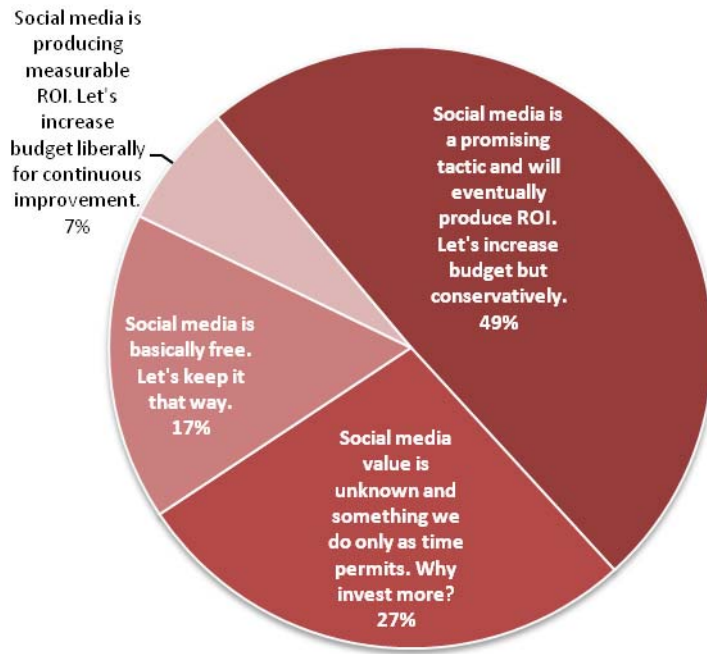


Source / Methodology: MarketingSherpa Social Media Marketing Benchmark Survey / Fielded Nov 2009, N=2,317

A FINANCIAL COMMITMENT TO OVERCOME CHALLENGES AND ACHIEVE SOCIAL MARKETING SUCCESS

Depending on the size and type of your organization, this may simply require a thumbs-up from your boss or demand a full scale lobbying campaign to win over skeptics and gain the support of an executive committee. But winning financial support for social marketing is no different than winning support for any other business initiative – you have to prove its value to the organization.

Chart: How organizations perceive social media marketing at budget time



 MarketingSherpa ©2010

Source / Methodology: MarketingSherpa Social Media Marketing Benchmark Survey / Fielded Nov 2009, N=2,317

Considering that social marketing is at a very early stage in its lifecycle, a 7% confidence rating indicating it is producing measurable ROI and should be funded liberally is outstanding.

Conservative budget increases by half of all organizations at budget time, based on the promise that social media will eventually produce ROI, demonstrate another vote of confidence in the tactic for the longer term.

The 17% of organizations who still believe social media marketing is basically free, and should stay that way, are destined to get what they pay for.

THE SOCIAL MARKETING ROAD MAP DEFINED

A METHOD FOR MAPPING AN EFFECTIVE SOCIAL MEDIA STRATEGY

Developing an effective strategy for integrating social media into the mix is a significant obstacle to the successful adoption of social marketing. Seeing the need for a practical method for overcoming this obstacle, MarketingSherpa created the Social Marketing ROAD Map. Using this methodology to develop a strategy gives marketers the ability to make winning decisions. The Social Marketing "ROAD" Map is an acronym for the following four elements:

Social Marketing **ROAD** Map

- Research**

Gather intelligence on target audiences, social use and competition.
Stop, look and listen – it's the first step to an effective social marketing strategy. Profile your target audiences and their social characteristics. Monitor their dialog and how preferred platforms are used. Benchmark brand popularity, share of voice and other qualitative and quantitative social metrics for your company and competitors. This is an opportunity to also assess your organization's existing resources, communities and digital assets that will add value to your strategy.
- Objectives**

Define objectives aligned with target audiences and social metrics.
Forget about soft objectives like "increasing awareness." Achieving hard, measurable and targeted objectives is the only way to win over social marketing skeptics who control the budgets at your organization. Segment, select and prioritize target audiences by social status. When possible, align objectives with metrics traceable to financials like ROI, cost-per-lead and sales conversions rather than qualitative measures like sentiment. There are a variety of free tools (Google Analytics, Social Mention, etc.) and commercial analytical solutions for providing the quantitative tracking data required.
- Actions**

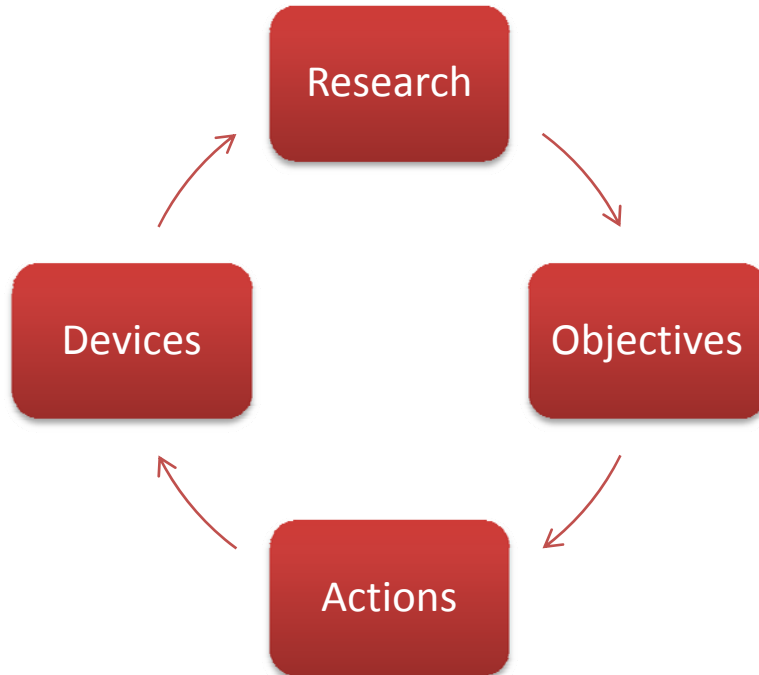
Create a social marketing strategy with a tactical plan of action.
Once you have established targeted and measurable objectives, you will need to plot a course of action toward achieving the desired outcomes. This section will specify the social marketing tactics, implementation timetables, campaigns and best practices, roles and responsibilities, policies and procedures, and budgets your strategy will require. It will also define your social marketing architecture – the pathways for connecting target audiences and conversations to content hubs, landing pages and conversion points.
- Devices**

Select platforms by their tactical effectiveness and architectural fit.
An effective strategy is expected to outlive the brief lifespan of today's popular social platforms. Therefore, your ROAD Map to this point has been technology brand-agnostic. But now is the time to identify, assess and select the appropriate social platforms (or Devices) that fit effectively into your current social marketing architecture. If a social network is appropriate, will it be Facebook or LinkedIn? Do you need to build a private customer service forum or will a Twitter account be a better solution. These are the final questions your strategy will answer.

THE SOCIAL MARKETING ROAD MAP IS A CONTINUOUS IMPROVEMENT PROCESS

The Social Marketing ROAD Map is a four-step process for creating an effective strategy. The process is not linear, it is circular. It is a continuous process for improvement that grows more powerful with each cycle. The Japanese coined the term “Kaizen” for the continuous improvement process, or the never-ending effort to improve products, services and processes. In this case, we use Kaizen as a never-ending effort to improve the results of your social marketing strategy.

THE SOCIAL MARKETING ROAD MAP CYCLE

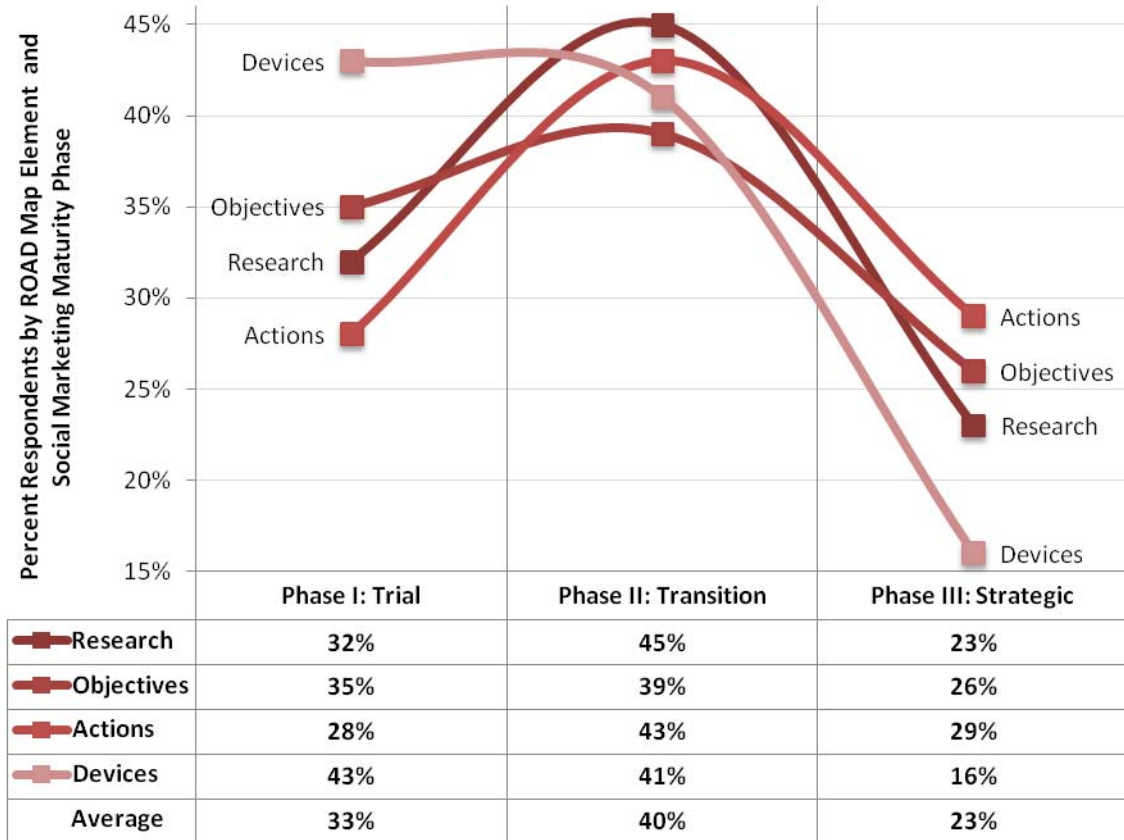


The Social Marketing ROAD Map cycle initially begins with Research, or gathering intelligence on your social marketing situation prior to developing your strategy. Once the initial cycle is complete, it begins all over again at the research step by gathering intelligence, not only on the current social marketing situation but, on what worked and what didn't during the previous cycle.

AS SOCIAL MARKETERS MATURE, THEIR PRIORITIES CHANGE DRAMATICALLY

Earlier in this handbook, you determined which phase of social marketing maturity you are now in and how you stacked up against other organizations. This chart provides a break-out for each of the critical factors to social marketing success (or ROAD Map elements) by phase of social marketing maturity.

Chart: ROAD Map elements prioritized by phase of social marketing maturity



Source / Methodology: MarketingSherpa Social Media Marketing Benchmark Survey / Fielded Nov 2009, N=2,317

For organizations in the Trial Phase, we see most organizations focused on Devices (social media platforms). We see the focus shifting to Research in the Transition Phase and to Actions in the Strategic Phase. The key takeaway here is that emphasis on Devices drops from the top line to the bottom as an organization's social marketing maturity evolves.

LET'S GET STARTED!

The stage is set and you're ready to get started. The following four chapters of this handbook are designed to provide a step-by-step methodology for mapping your social marketing strategy. This strategy will be the compass that guides you through the unfamiliar terrain ahead to social marketing success. Good luck!