



Integrating Your Social Media Engagement Strategy

WORKBOOK

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Introduction

Few of us in marketing or PR [on the agency or client side] would deny the value of integrating our efforts with those of the sales, customer service and community moderation teams. It's a vital part of building a social media-driven engagement strategy to reach customers, end-users and influencers. But most of us lack a clear sense of how to do it. Once more, it's often not a top priority – even though many of us want it to be.

Blame it on the lack of time, limited resources, siloed thinking that still pervades company cultures or the difficulty in measuring collaboration's ROI, but our gaze is outward – generating coverage, building fan bases, implementing social networking applications and creating viral campaigns.

Yet in the age of social media, we no longer have the luxury of working as independently. It is time to take a closer look inside our (or our clients') organizations, embrace collaboration and better align PR and marketing strategies.

The need to work together is especially acute given the following developments:

1. REAL TIME RESPONSE

We live in a 24/7 always-on, always connected media environment. We are expected to respond to a blogger's query or a customer's complaint in real time. Failure to act quickly can potentially result in an online firestorm and lost customers.

2. OVERLAPPING CHANNELS AND RESPONSIBILITIES

Marketing, PR, customer service, sales, and community moderation teams – we are using many of the same tools and platforms. We are addressing the same people. Customers don't care which department meets their needs. This overlap of communications channels and responsibilities means we have to be more consistent in what we say.

3. CUSTOMER EMPOWERMENT

Social media gives everyone a microphone. Everyone feels empowered. Great marketing tools in the hands of unhappy customers can just as easily work against the brand as in support of it.

Integration is a real opportunity to do more with less. By aligning internal teams, we can improve efficiency, avoid duplication, clarify changing roles and responsibilities, identify sales opportunities, and resolve customer issues before they become PR nightmares.

I call the alignment of customer service, PR, marketing, sales, and community moderation integrated strategic engagement. It's an approach that helps to improve:

- Customer Relationships (what is your relationship to your customer within your organization)
- Engagement Practices (what is the message, who is the messenger and how do you communicate)
- Hand off Procedures (how are data and leads collected and information distributed)
- Follow up Processes (how quickly is the customer served)
- Shared Performance Metrics (what constitutes success and how is it shared)

By integrating our engagement strategies, PR and marketing professionals can embrace new ways of doing business that enhance the brand experience and corporate reputations.

In the following pages, take a hard look at your performance and how the rest of your organization impacts it.

In the process, don't lose sight of the endgame. Collaboration, alignment and integration can serve many objectives – from higher morale to product innovation – but here you should think about how they advance one thing – engagement.

One final note, this workbook is written from the client side perspective. If you are with an agency, please share it with your client or use it to understand how your agency can benefit from the questions contained within.

ASSESSING THE CURRENT LANDSCAPE AND EFFECTIVENESS OF YOU AND YOUR ORGANIZATION

Building an integrated engagement strategy begins with establishing a baseline – identifying the influencers, opinion leaders and online experts you want to reach and then assessing how well you and your company are reaching them.

| THE OBJECT OF ENGAGEMENT: INFLUENCERS/TARGET AUDIENCE

WHOM ARE YOU TRYING TO REACH/INFLUENCE?

HAVE THEY CHANGED IN THE PAST 3 YEARS?

HOW HAS REAL TIME/24X7 CONNECTEDNESS CHANGED YOUR RELATIONSHIP TO YOUR TARGET AUDIENCE?

HOW DO YOU REACH THEM?

ARE THEY MORE DIFFICULT/EASIER TO REACH?

WHAT DO THEY WANT/EXPECT FROM YOU?

WHAT DO YOU WANT FROM THEM?

| ENGAGEMENT PERFORMANCE

ON A SCALE OF 1-5 (WITH 1 BEING LEAST SATISFIED AND 5 BEING VERY SATISFIED)

| | | | | | |
|---|---|---|---|---|---|
| Current Performance | 1 | 2 | 3 | 4 | 5 |
| Reaching Your Targeted Audience/Key Influencers | | | | | |

| | | | | | |
|----------------------------|---|---|---|---|---|
| Achieving Your Objectives? | 1 | 2 | 3 | 4 | 5 |
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WHY?

HOW DO YOU THINK YOUR ENGAGEMENT PERFORMANCE COMPARES TO YOUR COMPETITORS?

HOW DOES YOUR ENGAGEMENT PERFORMANCE COMPARE TO MANAGEMENT'S EXPECTATIONS?

HOW WOULD YOU RATE YOUR KNOWLEDGE OF SOCIAL MEDIA?

HOW WOULD YOU RATE YOUR ABILITY TO KEEP UP?

HOW DOES YOUR ENGAGEMENT PERFORMANCE RATE WITH YOUR TEAM'S?

HOW DOES YOUR ENGAGEMENT PERFORMANCE RATE WITH THE REST OF THE ORGANIZATION?

WHAT ARE AREAS OF IMPROVEMENT?

| ENGAGEMENT EFFORTS

WHAT ARE YOUR BIGGEST OBSTACLES TO SUCCESSFUL ENGAGEMENT?

WHAT ARE YOUR EXTERNAL OBSTACLES?

WHAT ARE YOUR INTERNAL OBSTACLES?

IS THERE AGREEMENT ON SOCIAL MEDIA GOALS AND OBJECTIVES WITHIN YOUR COMPANY?

IS YOUR APPROACH TACTICAL OR STRATEGIC?

ARE YOUR EFFORTS A SERIES OF ONE OFF CAMPAIGNS OR A SUSTAINED CONVERSATION?

WHO IS IN CHARGE OF SOCIAL MEDIA WITHIN THE ORGANIZATION?

WHAT ROLE DOES MANAGEMENT PLAY IN DRIVING YOUR SOCIAL MEDIA EFFORTS? SHOULD THEY DO MORE?

WHAT ARE YOUR TOP PRIORITIES?

ARE BOUNDARIES BETWEEN DEPARTMENTS CLEARLY DEFINED REGARDING SOCIAL MEDIA IMPLEMENTATION? OR IS THERE TOO MUCH OVERLAP?

HOW HAS SOCIAL MEDIA CHANGED ROLES AND RESPONSIBILITIES FOR SALES, CUSTOMER SERVICE, PR AND MARKETING? ARE THEY CLEARLY DEFINED WHEN ENGAGING CUSTOMERS, END USERS AND KEY INFLUENCERS?

HOW SILOED IS YOUR ORGANIZATION?

HOW MUCH DUPLICATION IS THERE?

HAVE YOU LOST CUSTOMERS DUE TO LACK OF COLLABORATION?

HAVE OTHER DEPARTMENTS GOTTEN IN THE WAY?

HAVE OTHER DEPARTMENTS FACILITATED ENGAGEMENT?

WHO ARE THE “CONNECTORS” WITHIN YOUR ORGANIZATION?

DOES YOUR ORGANIZATION MAKE COLLABORATION A PRIORITY IN ITS ENGAGEMENT STRATEGY?

WHAT REWARDS ARE NOW IN PLACE TO COLLABORATE?

HOW EFFECTIVE IS YOUR COMPANY WITH SHARING INFORMATION?

WHAT STEPS HAVE BEEN TAKEN TO INTEGRATE SALES, MARKETING, PR, CUSTOMER SUPPORT, AND COMMUNITY MANAGEMENT?

IF YOU ARE USING COLLABORATION TOOLS, ARE YOU SATISFIED WITH THE RESULTS?

IF NOT, WHY NOT?

WHERE HAVE COLLABORATION TOOLS HAD AN IMPACT?

HOW WELL ARE CUSTOMER SERVICES ISSUES HANDLED THROUGH YOUR SOCIAL MEDIA CHANNELS?

HOW EFFECTIVELY ARE LEADS PASSED TO SALES IN YOUR SOCIAL MEDIA CHANNELS? IS MORE THAN ONE TEAM INVOLVED IN THE PROCESS?

HOW WELL TRAINED ARE SALES AND CUSTOMER SERVICE IN USING SOCIAL MEDIA CHANNELS?

WHO HANDLES COMMUNITY MODERATION?

WHERE DOES PR END AND CUSTOMER SERVICE AND SALES BEGIN IN YOUR SOCIAL MEDIA CHANNELS? ARE THE HANDOFFS CLEARLY DEFINED?

IN TERMS OF UNSTRUCTURED CONVERSATIONS WITHIN FORUMS AND SOCIAL NETWORKS, WHAT ARE THE ORGANIZATION'S STRENGTHS AND AREAS OF IMPROVEMENT?

Our Consulting Services

Customized PR+MKTG Camps - These highly interactive one-day events are customized versions of larger PR+MKTG Camps that we have held in cities like Atlanta, New York, Seattle and Chicago. Designed to address the specific needs and level of your audience, these Camps bring together PR and marketing departments (and agencies and vendors) to better align roles and responsibilities, strengthen online presence and position PR and marketing as the main drivers of social media across the entire enterprise.

Targeted Communications Audits - Our team assesses trending data on networks, influencers, and conversations to provide in depth analysis of your online presence and that of your competition. We address specific market research questions surrounding your company, product(s), market, and industry.

Strategic Counsel - We provide senior counsel to help you:

- define and translate broad communications objectives into programs that blend new and traditional media (including online reputation management, relationship building and message/key word alignment)
- build influencer programs to extend messaging and generate new sales leads
- assist customer support by using social media as an early warning to track trends, monitor changing sentiment, and identify customer issues;
- market results internally and coordinate communications efforts of various internal and external stakeholders;
- establish PR as a strategic partner

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Dan Greenfield is producer of PR+MKTG Camp™. A senior communications executive, Dan was vice-president of corporate communications at EarthLink, has led PR efforts in the telecommunications industry and worked as a press secretary on Capitol Hill and on electoral campaigns. He is a respected industry blogger and an award-winning video producer. His consulting practice specializes in conducting communications audits and customized workshops and providing strategic counsel.

About PR+MKTG Camp: PR+MKTG Camp began in 2009 as a half-day workshop for communications professionals. Today PR+MKTG Camps are immersive, one-day events to better manage, market and measure social and traditional media.

From the very beginning, PR+MKTG Camp was designed as an alternative to conventional conferences. Its logo is a campfire. Campfires are places to gather, tell stories, forge bonds and share good times. PR+MKTG Camp is a venue to help PR and marketing professionals better integrate their social media engagement strategies. The structured, highly participatory event delivers relevant outcomes, practical insights and actionable results.

