

Making Everything Easier!™

Emailvision Special Edition

Social CRM

FOR

DUMMIES®

emailvision 

Amita Paul
Johanna C. Nilsson



About Emailvision

Emailvision is the worldwide leader in on-demand email and social marketing. The Emailvision mission is to provide excellence in technology and services for online relationship marketing. The company is majority-owned by Francisco Partners of California, and is led by the same visionary leaders who founded the company in 1999. With offices in 18 countries, Emailvision delivers four billion messages per month on behalf of more than 3,000 clients worldwide. The organization provides a pioneering technology platform, industry-leading deliverability rates, in-depth relationships with more than 150 global ISPs, and best-in-class client services. Emailvision's unprecedented quality of service is driven by 12 years of research and development and by the organization's 400 passionate employees who are dedicated to helping customers harness the exceptional potential of email and social marketing.

Meet Emailvision on Social Networks:

- www.emailvision.com
- blog.emailvision.com
- www.facebook.com/emailvision
- www.twitter.com/emailvisionuk
- www.youtube.com/emailvisiontv
- www.linkedin.com/companies/emailvision

Amita Paul is a bright entrepreneur of the Social Media generation, and brings with her over 15 years of product management and marketing experience from a wide range of industries including retail management, email marketing, direct marketing, and information retrieval. In 2008, Amita Paul founded a social media start-up called ObjectiveMarketer. Under Amita's leadership, the ObjectiveMarketer team developed an enterprise-class marketing solution that manages and measures social media campaigns across all of the major social media channels. In 2011, ObjectiveMarketer was acquired by Emailvision. Amita is now working as a global Director of Social Media Marketing at Emailvision.

Johanna C. Nilsson is the founder and principal of Herringbone, a San Francisco (California) and Stockholm (Sweden) based marketing communications firm specializing in social media marketing for clients who want their voices heard in the global marketplace.

Social CRM
FOR
DUMMIES®

**By Amita Paul and Johanna C. Nilsson,
Emailvision**

 **WILEY**

A John Wiley and Sons, Ltd, Publication

Social CRM For Dummies®

Published by
John Wiley & Sons, Ltd
The Atrium
Southern Gate
Chichester
West Sussex
PO19 8SQ
England

For details on how to create a custom For Dummies book for your business or organisation, contact CorporateDevelopment@wiley.com. For information about licensing the For Dummies brand for products or services, contact BrandedRights&Licenses@wiley.com.

Visit our Home Page on www.customdummies.com

Copyright © 2011 by John Wiley & Sons Ltd, Chichester, West Sussex, England

All Rights Reserved. No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning or otherwise, except under the terms of the Copyright, Designs and Patents Act 1988 or under the terms of a licence issued by the Copyright Licensing Agency Ltd, 90 Tottenham Court Road, London, W1T 4LP, UK, without the permission in writing of the Publisher. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Ltd, The Atrium, Southern Gate, Chichester, West Sussex, PO19 8SQ, England, or emailed to permreq@wiley.com, or faxed to (44) 1243 770620.

Trademarks: Wiley, the Wiley Publishing logo, For Dummies, the Dummies Man logo, A Reference for the Rest of Us!, The Dummies Way, Dummies Daily, The Fun and Easy Way, Dummies.com and related trade dress are trademarks or registered trademarks of John Wiley & Sons, Inc. and/or its affiliates in the United States and other countries, and may not be used without written permission. All other trademarks are the property of their respective owners. Wiley Publishing, Inc., is not associated with any product or vendor mentioned in this book.

LIMIT OF LIABILITY/DISCLAIMER OF WARRANTY: THE PUBLISHER, THE AUTHOR, AND ANYONE ELSE INVOLVED IN PREPARING THIS WORK MAKE NO REPRESENTATIONS OR WARRANTIES WITH RESPECT TO THE ACCURACY OR COMPLETENESS OF THE CONTENTS OF THIS WORK AND SPECIFICALLY DISCLAIM ALL WARRANTIES, INCLUDING WITHOUT LIMITATION WARRANTIES OF FITNESS FOR A PARTICULAR PURPOSE. NO WARRANTY MAY BE CREATED OR EXTENDED BY SALES OR PROMOTIONAL MATERIALS. THE ADVICE AND STRATEGIES CONTAINED HEREIN MAY NOT BE SUITABLE FOR EVERY SITUATION. THIS WORK IS SOLD WITH THE UNDERSTANDING THAT THE PUBLISHER IS NOT ENGAGED IN RENDERING LEGAL, ACCOUNTING, OR OTHER PROFESSIONAL SERVICES. IF PROFESSIONAL ASSISTANCE IS REQUIRED, THE SERVICES OF A COMPETENT PROFESSIONAL PERSON SHOULD BE SOUGHT. NEITHER THE PUBLISHER NOR THE AUTHOR SHALL BE LIABLE FOR DAMAGES ARISING HEREFROM. THE FACT THAT AN ORGANIZATION OR WEBSITE IS REFERRED TO IN THIS WORK AS A CITATION AND/OR A POTENTIAL SOURCE OF FURTHER INFORMATION DOES NOT MEAN THAT THE AUTHOR OR THE PUBLISHER ENDORSES THE INFORMATION THE ORGANIZATION OR WEBSITE MAY PROVIDE OR RECOMMENDATIONS IT MAY MAKE. FURTHER, READERS SHOULD BE AWARE THAT INTERNET WEBSITES LISTED IN THIS WORK MAY HAVE CHANGED OR DISAPPEARED BETWEEN WHEN THIS WORK WAS WRITTEN AND WHEN IT IS READ.

Wiley also publishes its books in a variety of electronic formats. Some content that appears in print may not be available in electronic books.

ISBN: 978-1-119-97719-3

Printed and bound in Great Britain by Page Bros, Norwich

10 9 8 7 6 5 4 3 2 1



WILEY

Introduction

First the bad news: You and your company no longer control marketing, sales, support, or product development. Your customers have taken over. They've stopped passively soaking up sales pitches and buying only the products and services you choose to offer. They're now active participants in your business. Through the power of social media and networking, they can make or break you.

The good news? Through *social CRM* (customer relationship management), you have the opportunity to harness the power of consumers to market your products and services, improve customer satisfaction, provide support, and even develop ideas for new and improved products and services. This book shows you how.

About This Book

When done right, social CRM has enormous potential for improving and growing any business. Do it wrong, however, and social CRM has an equal potential for inflicting damage. Unfortunately, many businesses do it wrong. They start without a plan, drive away customers with pushy sales pitches, launch marketing campaigns without having analytics in place to track customer response, and commit dozens of other social CRM no-no's.

This book shows you how to develop and implement a social CRM strategy the right way.

Foolish Assumptions

While writing this book, we made some assumptions about you, the reader:

- ✔ You've heard about social CRM, social media, and social networking, but you're not sure how to use it to boost sales or improve your business.
- ✔ You want to do social CRM the right way and avoid the mistakes most businesses make when first starting out.
- ✔ You're willing to invest in social CRM, but you don't want it to completely consume your resources and frazzle your personnel.

How This Book Is Organised

This book is divided into six chapters, each covering a different aspect of social CRM. We also include a glossary so you can quickly brush up on the lingo and a Social Media Rule book, in *For Dummies* style, that you can start using right now.

Chapter 1: Exploring the World of Social CRM

This chapter offers a brief introduction to social CRM and explains how social CRM differs from traditional CRM and direct marketing.

Chapter 2: Gearing Up for Social CRM

In this chapter, you discover how to lay the groundwork for a successful program.

Chapter 3: Taking a Multichannel Approach

In this chapter, we explain how to coordinate a multichannel strategy to connect with current and prospective customers wherever they may be — Facebook, Twitter, YouTube, you name it.

Chapter 4: Cooking Up a Top-Notch Social Media Campaign

This chapter taps the power of social media to improve your business and boost sales and shows you how to automate your efforts to stay in touch without straining your resources.

Chapter 5: Optimizing Impact with Analytics

This chapter shows you how to track your success, and constantly adapt your social CRM strategy and campaigns to the ever-changing environment for maximum impact.

Chapter 6: Ten Tips for Getting Started

As an added bonus, Chapter 6 features ten tips on getting your social CRM system up and running the right way.

Icons Used in This Book

This book uses several icons to flag the most important items.



When you see this icon, you know you're about to read a practical tidbit that may save you time or money or improve results.



This icon marks information you should consider carefully and never forget.



Watch out! Follow this advice to sidestep a common and perhaps serious pitfall.

Where to Go from Here

Check out the chapter titles and section headings in this book and start reading wherever you like. This book is written so that you can read it from start to finish without breaking stride, but if you want to jump to a specific topic, you can start anywhere to extract good ideas you can leverage immediately. If you want more information and advice on social CRM or the latest in email marketing, visit www.emailvision.com.

Chapter 1

Exploring the World of Social CRM

In This Chapter

- ▶ Comparing traditional and social CRM
 - ▶ Noting the benefits of social CRM
 - ▶ Identifying the challenges
 - ▶ Establishing the right mindset
-

Being competitive in today's global economy hinges on the ability to interact with consumers online via social CRM (customer relationships management). In this chapter, you discover what social CRM is, its potential benefits, and ways to approach it.

Shifting Gears from Traditional to Social CRM

Although more and more companies are adopting the social CRM model, many still engage in *traditional CRM*, which is characterized by the following:

- ✔ The focus is on marketing and selling *to* customers.
- ✔ The business initiates and controls most of the dialogue.
- ✔ Interactions tend to be direct and formal (professional).
- ✔ Customers play a very passive role.

But social media and networking have transformed the global economy into something more like a small town marketplace, where community buzz, not marketing buzz, determines whether businesses flourish or fail.



Social CRM is a strategic response to this new business environment. With social CRM:

- ✔ The focus is on community and relationship building.
- ✔ Via social venues, including Facebook and Twitter, customers own and control the conversation.
- ✔ Communications are business-to-customer but also customer-to-customer and customer-to-prospect.
- ✔ Customers collaborate with businesses directly or indirectly to improve products, services, and the customer experience.
- ✔ Conversation is less formal and more “real,” moving from brand speak to community speak.

Transitioning from traditional to social CRM calls for fundamental changes in your organization’s CRM model and approach. Table 1-1 highlights these changes.

Table 1-1 Moving from Traditional to Social CRM

<i>Parameters</i>	<i>Traditional CRM</i>	<i>Social CRM</i>
Roles	Customer service	All employees engage
Function	Process-centric	Conversation-centric
Approach	Contact management	Community management
Channel	Well-defined	Dynamic and evolving
Value	Periodic connection with customer	Sustained customer engagement
Model	Simple transactions	Complex relationships

Harnessing the Power of Your Community

Social media enables you to harness the power of community participation and collaboration — two qualities inherent in social media and essential in your social media strategy. Of course, inviting community participation presents some risk. You can't control what people say about your brands online. But you can monitor their statements, respond to them, and engage with customers in a positive way that prompts constructive dialogue.



Formulate a strategy that keeps the community front and center. Listen carefully to their insights, concerns, complaints, and needs and find creative, effective ways to participate in the dialogue.

Knowing what's said about your brand

A big part of social CRM consists of monitoring the “air waves” and knowing what people are saying about your business and brand. When you know what's being said, you can better address customer needs and concerns.



With social CRM, you gain access to early warning signs of negative press and dialogue — and, consequently, a platform for addressing it and mitigating any damage.

Being accessible and responsive to customers

By establishing a social presence, you make it easier for customers and prospects to find and contact you, giving you more opportunities to initiate and nurture relationships. Social environments also provide a channel for responding quickly and effectively to customers.



Respond to dissatisfied customers immediately and in ways that create positive customer experiences. In a matter of minutes, a customer's bad experience with a support person can go viral and damage your business' reputation.

Recruiting, supporting, and rewarding influencers

Every community has a few members everyone looks to for information, guidance, and recommendations. These individuals have a tremendous amount of influence in the community. These *influencers* also have the ability to increase your reach by spreading information, through commenting and sharing. Influencers help your messages go viral.

Social media provides opportunities to identify these influencers and nurture positive relationships with them. The goal is to transform them into brand advocates.

A good way to start identifying these key players is to establish your own social properties, such as a corporate blog, Facebook fan page, Twitter account, and YouTube channel. Using these tools properly increases your visibility and builds a strong brand presence in the most active social settings.

As you generate and distribute content, social CRM tools enable you to monitor your community's response and begin to identify the most influential members — those who spread positive word of mouth about your brand and whom other members look to for information and guidance.

After identifying key influencers, your job is to equip and reward them. Following are a couple suggestions:

- ✓ Reward them with the proprietary information they need to strengthen their reputation as trusted authorities.
- ✓ Give them a “seat” on your community advisory board so that they feel appreciated and respected and have a voice in your brand's future.



Influencers and brand advocates increase the reach and impact of everything you do to promote your brand. For more about empowering influencers and advocates, check out Chapter 4.

Identifying and profiling user segments

Social media enables you to conduct focus groups and perform surveys with targeted demographics to better understand the behavioral and geographic profile of your customers and prospects.

Experimenting with different campaigns and messaging and monitoring the response gives you a very good idea of what message tone, theme, or product has the most positive impact . . . and which ones have a negative or no impact.

For example, suppose you're developing a promotional campaign for a product. You want it to include a picture of a woman and perhaps a short video. You could launch a campaign in the United States, at a certain time with a suggestive picture of a woman, launch it at the same time of day in the UK, and then launch a third time in both locations with a more conservative photo. In each case, you monitor the response and consult the analytics (see Chapter 5).

The ability to launch variations of a campaign gives you the opportunity to experiment with different parameters, including graphics, tone, message, video, and channel (for example, Facebook, Twitter, or YouTube). In the process, you gain valuable insight regarding your audience.



Map your Facebook fans and Twitter followers with your email list. As you profile user segments, identify the most influential members of the community and reward them with targeted and personalized emails, special offers, early notification of new product releases, and so on.

Recognizing the Benefits of Building a Social CRM Program

Making social CRM a central component of your business model is a major undertaking, but the potential benefits are significant enough to convince even the most reticent to make the investment. The following sections describe some of the many benefits.

Boost customer retention

Listening to and engaging positively with customers shows you care and reinforces customer loyalty. It also enables you to discover more about them — their passions, lifestyles, activities, communities they belong to, and so on. This valuable data helps you provide for their needs.



Switching to a different business is costly and inconvenient, so your customer's first choice is to stick with you, as long as you're able to provide what they need.

Social media enables you to proactively listen. It enables you to enter the environments where they're talking about their needs and possibly discussing your brand. You show you care by being where your clients are, listening carefully to what they say, and engaging in those discussions when appropriate.



Show you care by

- ✓ Listening carefully to feedback, suggestions, and critiques.
- ✓ Responding in a timely manner.
- ✓ Proactively sharing updates about your business and brand.

Communicating and interacting with the community on a regular basis helps them feel connected and keeps them informed about your company, products, and brands.

Generate leads



Providing relevant content that addresses consumer needs, offers solutions to their problems, and helps them make the most of your products and services is one of the most effective ways to generate leads. Current customers recognize the value your business offers, and they spread the word. Prospective customers who see what you have to offer become more receptive to your products and services.



Focus on nurturing relationships, earning trust, and offering something of value. Social CRM is less about marketing and selling and more about offering real value and teaming up with customers to improve their experience.

Turn leads into customers

If your business is set up in a way to automatically convert leads into customers, social media can help boost your conversion rates. First, make sure your customer conversion process is as automated, seamless, and hassle-free as possible, both online and offline:

- ✔ **Online:** Streamline the process for signing up for services or purchasing products. See how easy Amazon.com makes it and follow its model.
- ✔ **Offline:** If your sales process is to be completed offline, make sure that your sales department is ready to act on leads coming in from your website.



Relationships are a two-way street. If you want people following you on Twitter, you better follow them, too. If you expect them to show an interest in your business and brands, take an interest in them. Here are some ways to interact with your customers:

- ✔ Read and comment on a customer's blog as you would on a friend's blog, to show you listen and care. Be supportive and share valuable knowledge and insights that help prospects achieve their blogging objectives.
- ✔ When others share valuable information that's relative to your business, industry, or brand, share it on Twitter, Facebook, and even your corporate blog (assuming that you have permission to do so).
- ✔ Follow others on Twitter and seek opportunities to retweet content that's relevant to your community.
- ✔ If a community member has a relevant Facebook, become a fan, monitor wall posts, and seek opportunities to contribute positively to the conversation.
- ✔ Promote relevant content that others post on YouTube, Flickr, Slideshare, and other content-sharing venues. Rate the content, comment on it, and even share it on your site, if encouraged and permitted to do so.
- ✔ Consider contacting and interviewing a key influencer in the community and featuring the individual in an article or blog post that links to their social properties.



Don't use someone's Facebook page as your organization's self-promotional billboard. Respect and appreciate the fact that you've been graciously granted access to that space and show your appreciation by contributing something of value.

Reduce support costs

Facilitating peer-to-peer support through discussion forums may actually reduce the costs of product support as customers answer questions and solve problems.

Identify innovative ideas

Social dialogue often contains a wealth of information to fuel innovation. A customer's description of a problem may lead to a new product or service. Complaints about a product may lead to improvements in support and design. And customer feedback often contains suggestions for improving the customer experience.

Clearing a Few Small Hurdles

Every endeavor to improve customer satisfaction and business overall requires some effort and carries some potential risk. With careful planning, however, you can significantly mitigate the risks, maximize efficiency, and justify your ROI. The following sections explain how.

Mitigating risks

To reduce the potential risks involved, you can

- ✓ Establish best practices and guidelines that are in line with your corporate and brand (see Chapter 2).
- ✓ Implement procedures to establish a central plan for all your social CRM activities.
- ✓ Provide training to ensure that everyone is on board and aware of policies and procedures.

Check out Chapter 2 for additional guidance in establishing a structure and process that makes social CRM more measured and efficient and less prone to risk.

Maximizing efficiency

Social media is not a part-time job. To prevent social CRM efforts from becoming a time and resource hog, online marketing managers or social community managers must

- ✔ Plan to be proactive in engaging with social communities.
- ✔ Automate communications through RSS-triggered or pre-scheduled campaigns to be as efficient and productive as possible.
- ✔ Prioritize activities with dedicated resources to make your social CRM program scalable and sustainable.

Justifying ROI

Knowledge and analysis of key measurements transforms the social web from a source of largely unstructured qualitative data into a marketing framework you can view and track quantitatively.

Data collection and analysis doesn't need to be expensive, difficult, or controversial in respect to privacy issues. Combining and interpreting or trending relatively simple measurements provides very useful insight. Social media analytics make all this possible. (For more about analytics and estimating ROI, check out Chapter 5.)

Seeing Social CRM in Action

Social CRM strategies and implementation tend to vary according to industry. The following sections highlight the different ways key industries tend to use the social space to accomplish their goals and provide a case study for each industry.

E-commerce case study

A small online retailer created a landing page on Facebook with an invitation to “Like to access the savings.” When users clicked the invitation, they were redirected to a landing page tab with irresistible

coupons that attracted several different client segments to their site. As a result, they not only increased one-time online sales but also grew their fan and customer base to boost future sales.

E-commerce

Global giants, regional chains, and small online retailers are all embracing social media to

- ✔ Drive traffic to their websites and online outlets.
- ✔ Obtain and use customer testimonials.
- ✔ Advertise special promotions, coupons, and giveaways.
- ✔ Distribute product information.

B2B companies

Business-to-business companies tend to use social media for

- ✔ Product innovation inspired by customers asking questions, suggesting improvements, or posting solutions to problems they or others have had with a product.
- ✔ Customer service and education through press releases, how-to video tutorials, slideshows, industry articles, white papers, quarterly statistics, industry trends, world news, and so on.

B2B case study

A Fortune 100 technology company implemented a strategy of consistent messaging across all platforms, social media network automation, corporate blogging, and newsletter integration. As a result, the organization experienced a dramatic increase in fans and followers and boosted overall program participation with

independent software developers by 32 percent. This same company repurposed existing blog content for its newsletter and facilitated sharing it on numerous social media platforms. This approach helped expand campaign reach beyond existing members and ignited new email newsletter signups.

Publishers and authors

Publishers and their authors make extensive use of social media to

- ✔ Launch books.
- ✔ Distribute information on new and upcoming titles.
- ✔ Distribute excerpts and other teasers.
- ✔ Enable authors to communicate more directly with readers.
- ✔ Distribute video, so readers feel a closer connection with their favorite authors.

Publishing case study

A self-help author successfully sparked a viral campaign to promote her upcoming book launch. Her promotional blast included a speaker tour and a prepurchase offer on her Facebook fan page. She also shared valuable excerpts from the book complete with chapter references, blogged about the topic, emailed all

her contacts, tweeted regularly on Twitter, updated her LinkedIn profile, and reached out to colleagues and other contacts asking to help her promote the book. The process not only boosted initial sales far beyond what the publisher expected, but it did so almost instantly instead of taking the usual five to six weeks.

Entertainment and events

The entertainment industry and event planners are often skilled at tapping the full power of social media for

- ✔ Event promotions to generate buzz.
- ✔ Ticket sales, event registration, event date, and venue details.
- ✔ Sponsor exposure and details about the event host.
- ✔ Brand awareness and increased customer participation enabling customers to upload photos for tagging on Facebook and other platforms.

Real estate

Tech-savvy real estate agents have a strong social presence, leveraging social media's power to

- ✔ Establish themselves as credible, trusted resources.
- ✔ Generate leads by offering valuable insight and information and free appraisals (depending on location).
- ✔ Connect with colleagues in other locations to help clients with long-distance moves.

Event case study

A high-profile event company created a content and communication campaign with the goal of maximizing participation and increasing subscriptions to future events. Its strategy included the use of social media before, during, and after every event.

By using landing pages with relevant content also shared on Twitter, a call to action for event registration ("Click and bring a friend to get 20%

off"), and a user subscription form, the company made the campaign go viral. To increase reach, it distributed social media content to influential community members who spread the word.

Though the work involved was still considerable, the company was able to preschedule a huge amount of content using its social CRM system's bulk scheduling feature.

Chapter 2

Gearing Up for Social CRM

In This Chapter

- ▶ Implementing policies and procedures that work
 - ▶ Establishing an effective, efficient system
 - ▶ Streamlining activities with the right technology
 - ▶ Getting everyone on board and in-the-know
-

Social CRM isn't a simple add-on to your current CRM strategy and system. It's fundamentally a new way of doing business that requires company-wide policies, procedures, technology, and training. This chapter explains how to gear up for social CRM with these four essential components.

Setting Policies

Social CRM success begins with policies and a system (see the next section). Policies ensure that all personnel know what's expected of them.



Before anyone in your organization posts content or interacts with customers online, establish the rules of engagement. Be sure that everyone gets a copy of them, fully understands them, and grasps the importance of adhering to them.

Your corporate rule book should cover the following policies:

- ✔ Who's authorized to represent the organization online and post content.
- ✔ How to identify yourself online.
- ✔ Limitations to making commitments on the organization's behalf.

- ✓ Posting of confidential or copyrighted information, including financials.
- ✓ Whether and how to engage with news media.
- ✓ Whether and how to discuss competitors.
- ✓ Rules against posting anything offensive or engaging in online disputes.
- ✓ Individual responsibility to act in the best interest of the organization.

Policies and guidelines should be clear, but make them flexible enough to empower personnel to have genuine, human interactions with customers and the community. If you're in a strictly regulated industry, however, your communications or public relations (PR) department may need to filter any content posted online and notify all personnel: No posting without PR's okay. See Appendix B for a sample social media rule book.



Many large companies post their social media policies and guidelines on the web. Reference these valuable resources when developing your own policies and guidelines.

Developing an Effective System

To be effective and efficient, social CRM must be systematic. Every customer interaction must be logged, and every relevant mention of your business online must be identified, recorded, and, in many cases, responded to.

Having a system in place saves time and money, coordinates personnel and activities, ensures regular communication with customers and prospects, improves impact, and reduces opportunities for error.

An efficient, reliable system must address four areas (see Figure 2-1):

- ✓ Monitoring of social media platforms
- ✓ Content generation and distribution
- ✓ Centralized data storage
- ✓ Cross-department collaboration

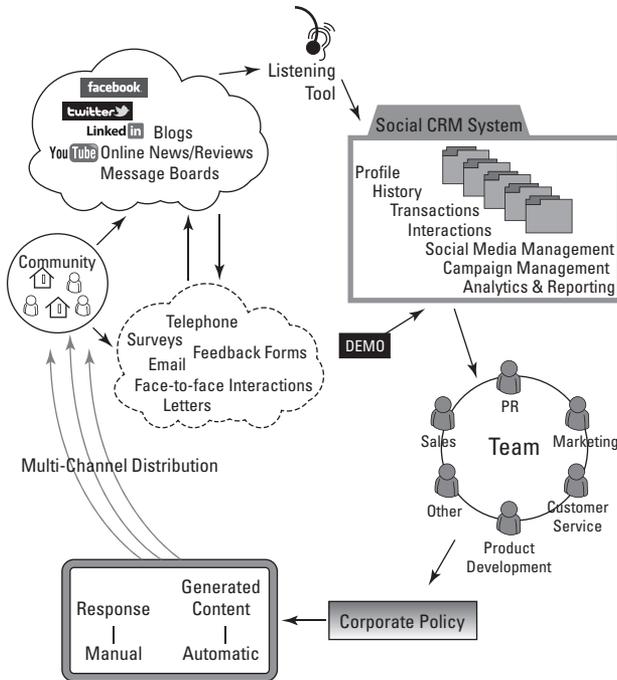


Figure 2-1: The social CRM process

Monitoring of all key platforms

Develop a list of keywords for your organization and industry and “listen” to discussions on all important social media platforms.



Monitoring software automates the process, recording relevant messages in online communities, including Facebook, Twitter, YouTube, LinkedIn, and message boards. This software may also assist with prioritizing discussions so you can respond quickly to the most significant messages.

Content generation and distribution

While monitoring deepens your understanding of what people are saying about your brand, content generation and distribution deepens the community’s understanding of your brand and your organization.

Content generation and distribution should be proactive, systematic, persistent, multichannel, relevant, high-quality, and two-way:

- ✓ **Proactive:** Deliver compelling content that serves your community members' needs before they even know they need it. Don't wait for someone in the community to initiate the conversation; take the initiative.
- ✓ **Systematic:** Create an editorial calendar ahead of time so you know what you're going to publish and when. You may stray from this calendar if events and discussions demand it, but having a plan in place ensures regular posting of content.
- ✓ **Persistent:** Distribute content on a consistent, regular schedule. A system helps ensure persistence.
- ✓ **Multichannel:** To remain in contact with community members at all touch points, establish a presence wherever they're likely to spend their time. (See Chapter 3 for details).
- ✓ **Relevant and engaging:** Deliver high-quality, engaging information that's relevant to your community's needs. Compose content in a way that sparks conversation and increases your reach as your primary audience spreads the word.
- ✓ **Two-way:** Listen carefully to how the community responds to your campaigns and messages so that you can use what you learn from them to better serve their needs and improve your business and brand.



Establish daily routines for publishing content and monitoring discussions. Remain attentive and be responsive so people know you're hearing them and considering what they're saying.

Centralized data storage

Centralized data storage enables all departments to tap the power of social CRM. For example, suppose a customer posts about a problem he's having with a product. Technical support may pick up on it and post a solution, customer service may contact him to check whether the solution was satisfactory, and product development may find inspiration for a new design.

Cross-functional team

Interdepartmental communication and collaboration are essential in forming favorable relationships and a common view with customers and the community. Departments include but are not necessarily limited to the following:

- ✔ **Public relations:** The PR department often has the most control and responsibility of a company's social CRM efforts, although it ultimately depends on the organization.
- ✔ **Marketing:** PR and marketing must share information, shape consistent messages, coordinate efforts, and improve response time and outcomes.
- ✔ **Sales:** Sales must bring PR up to speed on products, services, and pricing; the sales/purchase cycle; and distribution channels to enable PR to shape responses and coordinate special promotions with marketing and sales.
- ✔ **Customer service/support:** Customer service and support personnel must provide PR with timely information on customer interactions, feedback, and complaints; the right people to tackle different issues; and the process to ultimately resolve issues.
- ✔ **Product development:** PR, marketing, sales, customer service/support, and product development must work hand in hand to identify and resolve problems with existing products and discover opportunities for innovations that meet evolving needs.



Social CRM is not done in silos. Run social CRM as a cross-departmental project, working towards clear, common objectives.

Choosing the Right Social CRM Technology

You may engage in numerous social CRM activities manually, but a social CRM software solution makes these activities more structured and systematic, automates many processes and tasks, and provides access to valuable data and analytics. The following sections explain important considerations to make when choosing a social CRM technology.

Reaching out with popular social networks

Sometimes, Facebook and Twitter are either not available or not popular, so you need to use other social networks to reach a specific geographical client base. For example, during the writing of this book, Facebook is not available in China, but Renren and Zhihu are popular social networks. The following table lists popular networks by region:

Region	Network
Globally (excluding China)	Facebook, Twitter
China	Renren, Zhihu
Korea	CyWorld
Japan	Mixi



Social media is a new field, so the best technology is provided by developers who are thought leaders and continually improve and grow their technology to adapt to this evolving market. Your social CRM software provider should be your partner in developing a social media strategy and adjusting it as your needs change.



Consider working with someone who offers global support to make implementation and ongoing use much easier.

Technology capability

The first consideration to make is whether the software has the technological capability to serve your organization's needs. Your social CRM solution should be

- ✓ **Reliable** for serious business use. Choose a robust enterprise-class platform.
- ✓ **Scalable** to meet the ever-evolving and ever-growing needs of social CRM.
- ✓ **Compatible** with your existing system software or platform.

- ✔ **Centralized** so all departments have the data and tools to perform their assigned tasks.
- ✔ **Multitenant** with user management capabilities that allow for organizational hierarchies and workflow.
- ✔ **Multichannel** to stay in contact with customers and the community at all touch points, including Facebook, Twitter, LinkedIn, and YouTube.
- ✔ **Global and regional network infrastructure** to enable you to distribute your messages not only to Facebook and Twitter, but to other popular regional networks.

Must-have features

Any social CRM software worthy of consideration must have the following features or capabilities:

- ✔ **Monitoring:** The ability to listen to conversations about your business and brand whenever they occur in the social settings you choose to monitor.
- ✔ **Campaign management:** The ability to handle many content types, including photo, videos, updates, and user-generated content.
- ✔ **Advanced scheduling:** The ability to schedule content ahead of time in various ways, including single post, repeated posts, spread of posts in different intervals, manual or automatic queue content creation, and bulk upload of large amount of content.
- ✔ **Automated and multichannel:** Automated multichannel content distribution optimized by user-response feedback.
- ✔ **Productivity workflow management:** User management features to organize, assign, and manage tasks.

Analytics and reporting

Analytics and reporting features provide insight into how your community responds to your campaigns and messaging, helping you make better decisions and refine your social CRM

strategy. Be sure that the software you choose offers the following analytics and reporting capabilities:

- Multidimensional analytics on engagement, conversions, and reach and reports that provide actionable insights.
- Relationship-focused to see when and where your impact is strongest (platform, location, and date/time) and to identify your online influencers and advocates.

Figure 2-2 shows you social CRM reporting in action. This analytics screen from Campaign Commander Social Edition shows a clicks heat map, campaign reports, a map overlay, and activity details (posts and engagements).

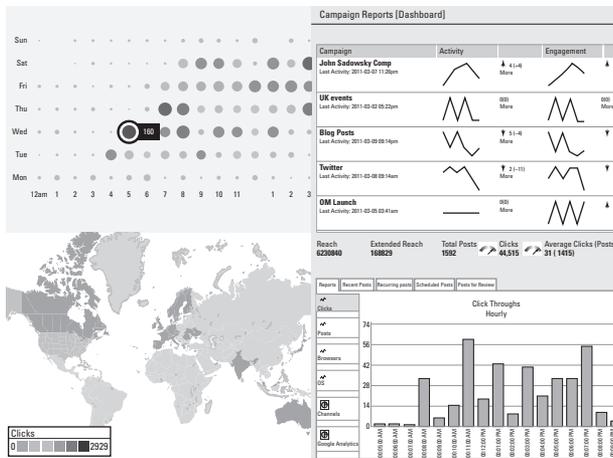


Figure 2-2: Social CRM reporting in action.

Training All Personnel

Traditionally, business-to-customer communications were just that — one-way, company-controlled. Breaking out of that mindset may be difficult, but the transition to relationship-driven communications is essential. With the proper training, personnel learn to drop the brand-speak and participate in the community-driven dialogue.



Empower all employees to get involved, but train them first. A minor faux pas in the social space may cause major repercussions. If you want to start small, get one person involved, but choose the right person — someone with a deep understanding of and passion for the company and today's technology. Assigning social CRM as a side project or hiring an intern to lead the effort in an unguided fashion may not be the best choice.

Training everyone in social CRM

Provide training both on how to use the social CRM system/software and how to communicate with customers and the community. Following are a few tips to optimize training:

- ✔ Provide group training with cross departmental participants to get everyone on the same page.
- ✔ If you're a larger organization, consider certifying a few individuals in social media and assigning them to mentor selected personnel.
- ✔ Review your social CRM policies and be sure everyone fully understands them.
- ✔ Review daily routines for content generation and distribution and train employees to respond to customers in real time.
- ✔ Provide software-specific training, including reporting, analytics, and use of data collected.
- ✔ Encourage everyone to measure the impact of campaigns and interactions and think creatively in responding to customer and community input and feedback. A response may consist of interacting with the customer, but it may also call for improvements to products, services, and procedures.

Learning and evolving

While training is a good start, personnel must continue to learn, adapt, and improve. Following are tips to accomplish that goal:

- ✔ Hold brutally honest experience-sharing sessions to exchange lessons learned.
- ✔ Include a feedback mechanism and escalation process that covers how to deal with different situations.
- ✔ Maintain a centralized internal blog of lessons learned during the week or good practices.

When everyone is involved in sizing up customers and community and your organization's relationship with them, they begin to notice patterns that provide opportunities for improvement and growth.

Chapter 3

Taking a Multichannel Approach

.....

In This Chapter

- ▶ Identifying the channels to focus on
 - ▶ Listening to and logging interactions
 - ▶ Becoming involved in several channels
-

With social CRM, the community controls not only the dialogue but also where it occurs — your company’s blog, Facebook, Twitter, YouTube, discussion boards, texting, and even over the phone.

In addition, dialogues are likely to transition from one communications medium to another, perhaps starting with an email message, progressing to a direct contact via telephone, and then moving to a social network, such as Facebook, where your customer discusses her experience with her Facebook friends.

To respond effectively to each conversation, you must be everywhere it may lead and follow it from start to finish. This chapter explains how.

Recognizing the Different Channels

A customer can shift channels as easily as changing channels on a TV, so you need a presence at every possible point of contact.



Keep an eye on the ever-changing landscape of social media, as shown in Figure 3-1, and be prepared to make adjustments. New channels may arise at any time, and old ones may fade.

Social Media Landscape 2011

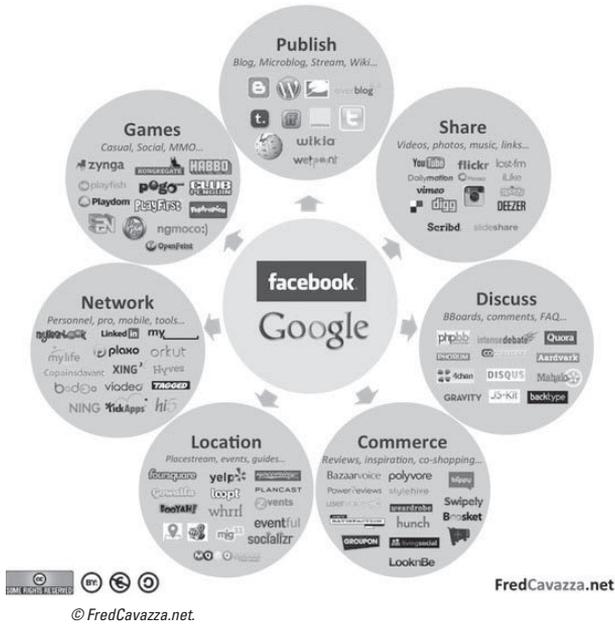


Figure 3-1: The social media landscape.

Social media/networking

Social media/networking channels are online all the time. Following are several important social channels and how they differ:

- **Facebook:** Social network for interacting with people you know
- **Twitter:** Informational network primarily for spreading the word among people you know and don't know
- **LinkedIn:** Professional network

- ✓ **Blogs:** User-generated content
- ✓ **YouTube:** Video content and the number 2 search engine
- ✓ **Message boards:** Discussion forums
- ✓ **Online news and reviews:** Media, including online newspapers, magazines, televised video clips, and radio

Blogs and message boards include any that your company sponsors plus others it doesn't sponsor, including your competitors' blogs.



Remain sensitive to differences in countries and cultures. A channel that's popular in one country may not be as popular in others as listed in Chapter 2. Cultural differences may also impact user expression on these channels. For example in Korea, users are more likely to share positive product experiences, whereas in Japan, users have a greater tendency to share negative product experiences, calling for a more attentive customer service engagement.

Direct channels

When focusing on the newer channels, don't forget traditional channels, which are just as crucial for your social CRM success. These traditional channels include telephone, email, surveys/feedback forms, letters, and face-to-face interactions.

Monitoring and Recording Interactions

An important step in social CRM requires listening to customers online and through direct contact and recording transactions and dialogue:

- ✓ **Online:** Listening software automates the process, tracking who says what about which brand and on which online channels.
- ✓ **Offline:** As personnel interact with customers offline, they must manually enter details about their interactions into the system.

The information you gather forms a valuable database to help identify and interact with your most important customers and influential community members.

One of the biggest challenges at the monitoring stage is in keeping track of an individual when he has multiple identities, including one or more email addresses, screen names, and phone numbers. Social CRM software can help match identities to each individual. (See Chapter 2 for other features when choosing a social CRM system.)

Establishing a Social Presence on Different Channels

Your business should have an official presence on the Internet and in every popular social network.



If you don't establish an official presence on a social network, someone else will do it for you — either a brand advocate or a disgruntled customer. You can't prevent others from starting a conversation about you, but having your own presence gives you more opportunity to take the lead in conversations.

Before setting your sites on Facebook and Twitter, establish a central presence on the web with a company website and blog. These two online assets becomes your social CRM hub — a focal point for your other social networking efforts.

To expand your reach and amplify your presence, branch out to other social settings, including Facebook, Twitter, YouTube, and LinkedIn. As you branch out, adhere to the following guidelines:



- Maintain brand consistency across all social sites, including user name, look and feel, profile photo, and logo.

Before registering your accounts, confirm that your preferred user name (usually your name or the name of your business) is available. A site like www.namechk.com can help you. If your name is taken, get creative. You may use a combination of your name and company or name and industry, but keep it short and avoid numbers and the underscore character.

✓ Create a compelling presence. Whether you create a Facebook page, YouTube channel, or Twitter profile, make it look professional and populate it with relevant, compelling content. Offer customers something of value to keep them coming back, such as

- Tips to optimize or get more out of your product
- Special offers and coupons
- Technical support
- Engaging games
- Competitions
- Humor



Never promise more than you deliver. Manage expectations so everyone eagerly anticipates what you'll do next and is never disappointed by what they get. As long as you provide what users are looking for and meet or exceed their expectations, they'll stay engaged.

- ✓ Provide official corporate contacts. Don't make your followers search for contact information.
- ✓ Add a personal touch by signing or initialing every post or message. On Twitter, you can create a list of people who post content, so your followers can approach them directly.

Combining Channels

A primary goal of social CRM is to stay connected with your customers, potential customers, and brand advocates at all touch points. Combining channels enables you to maintain contact as individuals skip around to the various channels.

Publishing to multiple channels

Using social CRM software, you can easily create and schedule messages to post them simultaneously to multiple channels. You can also automate campaigns to have messages distributed according to date, time, and frequency.

Integrating your blog with social networks

The best way to maintain contact with customers and potential customers is to let them know where they can find you online. Use your blog to promote your social networking activities and vice versa:

- ✓ Create RSS feeds on your Facebook page and on Twitter, so whatever you post on your blog automatically appears on Facebook and Twitter.
- ✓ Add social plugins, such as a Facebook badge and a Follow Me on Twitter button, to your website and blog, that visitors can click to become “fans” or “followers.”
- ✓ Add your website and blog address to your social profiles, so people know your official online location.

Using social networking in tandem with email



As a brand, your main goal is to make all fans and followers subscribers and make all subscribers followers and fans. To accomplish this goal, make the process as easy as possible for users. Here are a few suggestions:



- ✓ In outgoing email messages, include links in your signature line that recipients can click to follow you on Twitter or access your Facebook page.

Give subscribers an incentive to follow you — for example, 50 percent off their next purchase or free shipping.

- ✓ In any social environment you have a presence, include a “contact us” email address and your website and blog addresses, so people know where to find you and how to contact you and subscribe.



Provide teasers and incentives to encourage fans and followers to subscribe to your email list and unlock more details.

- ✔ When you post content on your websites and blogs or send messages via email, add social sharing links that readers can click to share the content on Facebook, Twitter, YouTube, and their other social networks.

Teaming up Twitter and Facebook

You can strategically combine the unique features of Twitter and Facebook to copromote one another and execute very creative campaigns. Here's how:

- ✔ **Add your Facebook URL to your Twitter bio.** This approach drives traffic to your Facebook page and increases “likes.”
- ✔ **Add your Twitter URL to your Facebook page.** This trick gives your Facebook fans an easy way to follow you on Twitter.
- ✔ **Optimize the impact of live streaming.** When conducting live interviews or sending messages from live events, use Twitter, which is better equipped to handle a large stream of updates. Also, provide your Facebook fans with your Twitter handle and an invitation to listen in.
- ✔ **Increase the reach of special Facebook deals.** When you post a special deal on Facebook, announce it on Twitter in a shareable message. Describe the offer and tell the user what to do to receive it. For example: “Get \$10 off your service of choice – print the coupon on Facebook and bring it in to redeem [URL to Facebook landing page]”. Offering special deals increases brand awareness, grows your follower and fan base, and increases walk-ins and in-store sales.
- ✔ **Add fans and followers to your email list.** By integrating your social connections with your email distribution list, you expand your reach via email and ensure that your fans and followers are kept in the loop with any targeted messaging.



Consider fans, followers, and email subscribers as part of one big common group. In your social media campaigns, following up with fans and followers is just as important as following up with subscribers.

Combining direct contact with online efforts

With social CRM, the lines separating channels nearly disappear. For example, you may have customers become a Facebook “fan” to receive a coupon on their cell phone that they can show a clerk at one of your stores to obtain a discount. Or you may have a Facebook app that customers can use to place an order online without having to leave Facebook.

Businesses have come up with all sorts of creative ways to merge online and offline channels. One creative way to combine online and offline channels is through the use of quick response (QR) codes. A QR code is a dot-matrix bar code, shown in Figure 3-2, that users can scan with a QR barcode reader or camera phone to obtain special deals or additional information about a product or service. For example, a customer may scan a QR code to obtain one or more of the following:

- ✔ Coupon
- ✔ Nutritional information about a food product
- ✔ Brief video demo of the product in action
- ✔ Recipe
- ✔ Fashion and accessorizing tips and suggestions
- ✔ Toll-free phone number for more information

You can place QR codes just about anywhere in the real world: in your storefront window, a product package, receipt, brochure, newspaper or magazine ad, signage, or even a billboard.

If you have the feature on your phone, scan in the QR code in Figure 3-2 for a brief demo.



Figure 3-2: A sample QR code.



Don't use QR codes for traditional marketing or merely to link back to your organization's home page. QR codes need to deliver added value and improve the customer's experience. "Added value" doesn't necessarily translate into "special offer." It may mean "educational," "entertaining," or "funny."

Chapter 4

Cooking Up a Top-Notch Social Media Campaign

In This Chapter

- ▶ Launching social media campaigns
 - ▶ Generating leads using social CRM
 - ▶ Converting prospects into customers into advocates
-

Successful social CRM is part proactive, part reactive. Proactively, you deliver what your customers and community need and want before they ask for it. Reactively, you engage in conversations and address issues as they arise. This chapter explains how to do both and capitalize on the results.

Grasping the Concept of Social Media Campaigns

Unlike a traditional marketing campaign, which has a one-time burst of messages, a social media campaign takes a funnel approach to connect with and usher new and prospective customers through the stages of the sales cycle from awareness to purchase, as shown in Figure 4-1.

Campaigns make social media initiatives more strategic and modular. They enable you to structure messages, monitor feedback from each social media environment, and then fine-tune message delivery to optimize impact and reach. The following sections offer guidance on creating and managing effective social marketing campaigns.

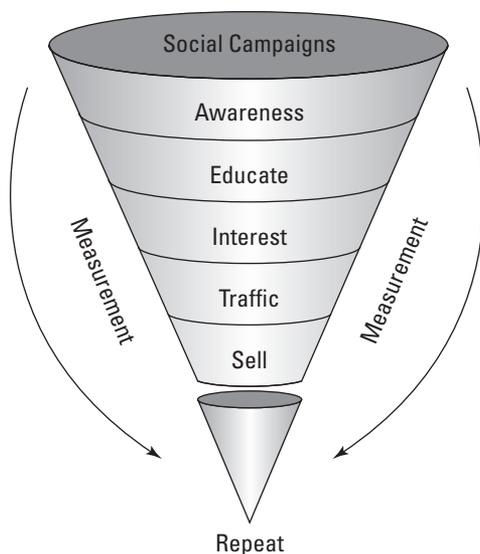


Figure 4-1: Social media campaigns take a funnel approach to conversions.

Picking a theme for your campaign

A theme-based campaign is one that focuses on a specific topic centered on a message that's in line with the following:

- ✔ Your community's demographic, interests, needs, and culture.
- ✔ The nature of your business, brands, and products.
- ✔ The social environment and what it offers, such as YouTube for video sharing or tweeting during live events.
- ✔ Your specific campaign goal (see next section).
- ✔ Your overall corporate strategy.

Pixar and Disney's Toy Story 3 campaign

To promote *Toy Story 3*, Pixar and Disney bombarded the social space with videos featuring characters from the movie in fake ads that appealed not only to kids but also to their parents who could relive “the good old days.” The campaign included a Facebook page with an app for people to buy tickets and invite their Facebook friends to see the movie as well. In a play off the movie’s tagline, “No Toy Gets Left Behind,” the page encouraged fans to leave no friend behind when going to see the movie and facilitated the process of organizing group viewings.

The campaign was ideal in terms of appealing to the community’s

demographic (the kid in all of us), interests, needs, and fun-loving culture. By using characters from the movie and the animation technology that made these movies so successful, the campaign reinforced the brand. It was multichannel, using the unique features of different social environments, including Facebook, YouTube, and Twitter, to spread the word. It had a specific goal – to sell tickets and invite friends to come along. And it was perfectly aligned with Pixar’s and Disney’s corporate goal of being leaders in animated films.

In addition to igniting community buzz and increasing your reach, social media campaigns enable you to

- ✔ Analyze performance of all social initiatives and activities related to the theme (aggregate analysis) to gain insight into whether your audience is more receptive to an informational or promotional theme, for example. (For more about this type of analysis, see Chapter 5.)
- ✔ Test messages with different content or tone (A/B testing) to determine which message has the most favorable impact on your audience.

Setting measurable goals

What gets measured gets valued. Campaign goals enable you to analyze how effectively you engage with your audience on a continual basis, while the campaign is still active, so you can

optimize it on the fly. Goals guide content strategy and provide a benchmark for measuring the campaign's effectiveness. When setting goals, answer the following two questions:

- ✔ **What do you hope to accomplish with this campaign?**
Is the campaign's goal to have people register for a free quote, sign up for a newsletter, or give a thumbs up or down on a new product idea? Get their friends to sign up?
- ✔ **How does this campaign align with the organization's overall goals?** Most organizations want to increase brand awareness, generate leads, and boost sales. As the corporate strategy changes, adjust your campaigns accordingly.
- ✔ **How does this campaign reflect the corporate identity?**
A good campaign reflects the values and culture of your organization.
- ✔ **What determines the success of the campaign?** Social media has no definitive benchmarks for measuring success so the goal may be a number, such as a targeted conversion rate, or something simple like expanding your community or reducing customer support by 50 percent. Just make sure that the benchmark resonates with your corporate strategy.

Choosing a fitting campaign type

Choose a campaign type that's most closely aligned with its purpose and goal. Campaign types include the following:

- ✔ **Engagement campaign:** *Engagement campaigns* are geared to spark a specific reaction or response. Tapping into a trending topic is an effective way to engage with your customers.
- ✔ **Event campaign:** An *event campaign* triggers messages that are related to the event itself, including venue, topics, speakers, and other information that increase interest and participation in the event and keeps attendees in the loop.

The event itself gives you an opportunity to engage with the audience to increase awareness of your business and specific technologies or products. Events are also great for generating content and distributing it beyond the borders of the event.

- ✔ **Informational campaign:** An *informational campaign* keeps customers and community abreast of new products, awards, company and industry news, and so on.
- ✔ **Promotional campaign:** *Promotional campaigns* are best for spreading the word about weekend sales, limited offers, contests, signups, sweepstakes, and so on.
- ✔ **Transactional campaign:** A *transactional campaign* incentivizes users to make a purchase through the use of coupons (online or offline), promotional codes, and similar offerings.

Getting web analytics in the game

If your campaign's purpose is to drive traffic to your website, integrate web analytics to measure user activities on the site. By integrating web analytics into a campaign, you can measure its impact from start to finish, from click-throughs to conversions.

To integrate web analytics, modify your web sites, blogs, and other properties so the technology can monitor them. Here are some suggestions.



Consider dedicating a specific page or creating a new landing page for each social media campaign. This dedicated page greatly simplifies the task of isolating and tracking traffic for specific campaigns.

- ✔ Use your social CRM's webform creation tool to construct any and all forms that users complete and submit, including search forms. This tool enables you to track conversion rates, sales, and profitability more easily. You may place these webforms on a landing page or even on a Facebook wall landing page (tab).
- ✔ If you have an affiliate program, provide affiliates, influencers, and advocates specific links to the campaign's landing page. In addition to increasing reach and sales, trackable affiliate links enable you to identify your most productive partners.

For more about web analytics, including how to interpret the data you collect and decide which adjustments you need to make to your campaign based on that data, check out Chapter 5.

Launching and tracking campaigns from start to finish

With a plan in place, you're ready to launch and track your campaign. The following steps lead you through the process:

1. **Create content.**
2. **Distribute content to all key social sites.**
3. **Monitor and manage user interaction to build relationships with influencers and amplifiers.**
4. **Gather and analyze feedback and statistics to develop actionable insights.**
5. **Implement changes based on insights.**



Changes may improve current and future campaigns, your organization overall, products, services, and/or the customer experience.

Using Social CRM for Lead Generation and Conversion

A marketing campaign is not an end in itself; it's part of a process, a lifecycle comprised of a two-stage process:

- ✓ **Engagement:** Through marketing campaigns, content generation, and other social activities, you attract and engage users.
- ✓ **Recruitment:** Certain community members stand out as the most influential. Your goal is to identify these individuals and nurture relationships with them to increase their influence and transform them into brand advocates.

Revenue generation is not part of the lifecycle, but success at engagement and recruitment naturally leads to converting influencers and advocates into revenue opportunities. They become a mini marketing, PR, and sales force and often contribute or inspire ideas to improve your organization and what it offers.



Social CRM isn't just about engaging in conversations. To make social CRM worthwhile for your organization, you must approach it as a revenue-generating lifecycle.

Letting Your Advocates Advocate

The best way to inspire your best advocates is to let them work their magic without interference, except in issues of ethics and legality. Your advocates are not pawns — they're partners, so treat them accordingly. Give them what they need to establish themselves as credible authorities on your products — information.



The community relies on advocates to deliver information they can't get anywhere else, so leak the big news to your advocates before anyone else finds out about it. (Tell them to keep it a secret, and word will spread even faster.) Giving your advocates the inside scoop is a great way to quickly spread the word about special events, new products, and product changes.

Fostering Many-to-Many Relationships

A brand community is not a one-to-many relationship; it's not your organization speaking to the community —that's brand autocracy. People need to interact with each other and not simply "the brand." The following sections offer ways to get people talking to one another.

Let 'em talk

People are going to talk about your organization and what it offers. For the most part, just step back and let 'em talk. To be more proactive, give them places to hang out and talk — an official blog, support forums, Facebook pages, YouTube channels, and so on.

As a community forms, users naturally converse with one another, answer each other's questions, solve each other's problems, and recommend other products and solutions. In some cases, peer support is nearly all the product support the community needs.



Listen for positive comments and feedback and ask for testimonials. You may approach the person via email and ask something like, “Because you like it so much, would you mind going to mysite.com/reviews and posting a review?”

Correcting misinformation

The Internet has its fair share of misinformation and misrepresentation, especially in social media venues. Correcting the record is important, but do so tactfully:



Don't correct a person in public. If someone posts something incorrect, contact the person directly, via email or a private message, so she can correct herself.

- ✔ If someone in the community posts something that misrepresents an issue or unfairly criticizes your business or brand, feel free to blog or post a rebuttal. Just remember to identify your company affiliation, stick to the facts (rather than engaging in personal attacks), and be diplomatic about it.
- ✔ Be honest. If you make a mistake, admit it, correct it, and move on. Denials, coverups, and even avoidance don't work and only make things worse. When you correct yourself, though, format the changes, so people can see the mistake and your correction.

Chapter 5

Optimizing Impact with Analytics

In This Chapter

- ▶ Tracking traffic and more with web analytics
 - ▶ Tweaking your approach to optimize results
 - ▶ Sizing up the return on your investment
-

Navigating the social media landscape without analytics is like flying a plane without gauges. To stay on course to meet your social CRM goals, you must constantly monitor what's going on with your customers and in the community and make adjustments to your campaigns, when necessary.

Integrating web analytics into your campaigns enables you to observe and evaluate online activities, including page visits and returning visits, conversion rates, and referring pages (where visitors come from). These valuable *metrics* (measurements) and numerous others enable you to track and analyze activity from campaign initiation all the way to lead conversion and evaluate your social media efforts to discover what works and what doesn't and fine-tune your system.

Reading the Social CRM Dashboard

A robust social CRM platform should offer a dashboard, as shown in Figure 5-1, to provide insight into all points of interaction with users, including clicks, shares, and retweets; Facebook comments and likes; and YouTube views and subscriptions. In

- ✔ YouTube views, comments, demography, and number of videos related to your organization and brand that others have uploaded
- ✔ Demographics and a heat map showing where your audience is and the best times to reach them
- ✔ Facebook likes, shares, and comments

High-level metrics

Metrics for identifying trends and patterns may also be useful in spotting opportunities and adjusting strategy. These high-level metrics offer insight into the following:

- ✔ **Growth:** The growth metric reveals which social CRM sources contribute most to growth in terms of customers, visitors, users, and fans. Analysis reveals how the results of your (paid) efforts compare to those from (free) organic sources, and viral outcomes (referrals). (*Organic* includes people finding you through searches, press coverage, bloggers, product directories, and other sources you don't pay for.)
- ✔ **Engagement:** The engagement metric reveals how long visitors remain on your site or on specific pages, how deep they go, and where they wander.
- ✔ **Retention:** The retention metric reflects the frequency at which recognized individuals return to your site or specific pages and the length of time they remain regular visitors before dropping off the radar.
- ✔ **Monetization:** Monetization metrics include average revenue per user (ARPU), average revenue per paying user (ARPPU), percentage of active users who pay, and so on. Think of monetization as the bottom line metric.

Making Sense of the Facts and Figures

Integrating web analytics into your social CRM campaigns enables you to seamlessly measure user activities on your website and observe patterns that reveal how users respond to your social media campaigns.

Web analytics should provide insight into the following metrics and assist in answering key questions about each metric:

- ✔ **Lead generation:** How do social channels perform as a lead source in comparison to your overall lead generation activities? Your social channel may generate a large number of leads, but if the quality of leads is low, more information may be needed upfront to be sure you're attracting the right prospects.
- ✔ **Conversion:** How do your click-through rates compare with your conversion rates? Your campaign may be successful on attracting traffic, but if your site has a poor track record for converting visitors, it may require some adjustments.
- ✔ **Membership:** How many of your fans are active on your other social channels, and how do they compare on their interaction with your social campaigns? If the number is low relative to the total, you may not be providing what your clients are looking for. Increased engagement may help you gain a deeper insight into what your clients really want.
- ✔ **Member activity:** What percentage of your website traffic is from regular social media subscribers? If the number of returning visitors is low relative to new visitors, you're looking at a customer retention problem you need to address. The good news is that your campaigns are successful at attracting new prospects.
- ✔ **Mentions:** What is the trend and traffic activity based on mentions initiated by influencers and advocated of your business? How does this traffic compare with traffic from your social campaigns? This count shows how strong your brand community is and how well you're tapping their power.
- ✔ **Content and virality:** Which content generates more traffic and is most effective in encouraging recipients to share it? By looking at send-to-friend, cross-posts, Diggs, Likes, and similar metrics, you can gain a sense of which tone or message content has the best reach.

As you can see, analytics provide actionable insights to assist you in managing and perfecting your campaigns through the three-stage process illustrated in Figure 5-2: Campaign, Web Analytics, and CRM Solution.

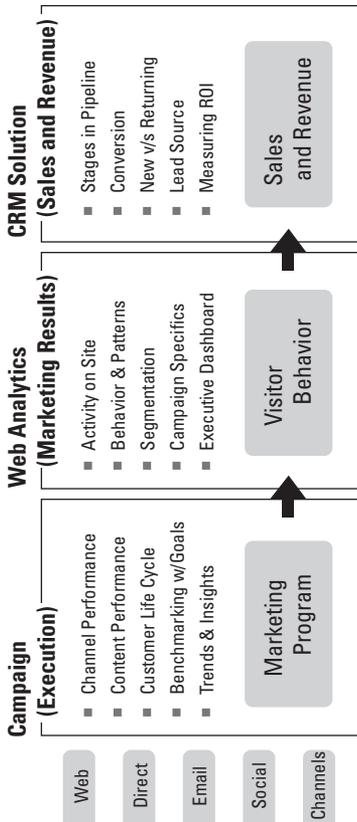


Figure 5-2: Social CRM's three-step process.

Calculating Your Social ROI

At some point, every CEO, small-business owner, or marketing or PR manager asks herself, "Is this really worth it?" Crunch the numbers to find out. According to *Entrepreneur* magazine's Mikal E. Belicove, the process for calculating social ROI is as follows:

1. **Consult your social CRM dashboard to identify customers that your social media initiatives influenced to visit one of your websites, stores, or branches or contact your business via phone or email.**

2. Find out how much those customers actually spent, if anything.

This number represents the sales your social marketing has grossed.

3. Calculate the total amount invested in social media initiatives.

Include employee pay and benefits, social technology expenditures, and design and hosting fees.

4. From the number in Step 3, subtract the number in step 2.

You now know your social CRM ROI.



If you're looking at a low or negative ROI, don't be too hasty in scrapping what you've invested so much in building. As you gain experience and insight and begin to master the tools of the trade, you begin to see that number grow.



You may not see a direct impact on the revenue of a social media campaign. An analytics driven social media campaign provides accountability based on the campaigns established goals.

Chapter 6

Ten Tips for Getting Started

In This Chapter

- ▶ Doing business in a social setting
 - ▶ Drafting a budget
 - ▶ Choosing the right strategy and metrics
 - ▶ Focusing on customers and community
-

We have helped numerous clients integrate social CRM into their business models to engage customers and community. Along the way, we've gained insight into the most common pitfalls and developed strategies for starting out on the right foot. This part offers ten suggestions to help you avoid mistakes and optimize success.

Embrace a Social Culture

To do business in a social setting, shed the business suit and embrace the social culture. Nobody wants to think about business and work when they're hanging out with friends on Facebook, tweeting on Twitter, or watching the latest viral video on YouTube. They want to be informed and entertained and have something exciting to share with others.



Treat people more like close friends, relatives, and colleagues and less like customers. You wouldn't shove an ad in your friend's face when you're out to dinner, but if they're planning a vacation to somewhere you've been, you might recommend a great restaurant or hotel.

Get to know your customers — what they like and dislike, what they do in their spare time, what they need to make them successful and happy. When you know your customers,

you're better equipped to keep them engaged, informed, and entertained and to provide for their needs. The goal is to earn their trust, so they feel comfortable doing business with you and recommend you to their friends.

Hire the Right People and Train Them Well

Social CRM is a team sport, and your team is only as good as its weakest player, so hire the best. Recruit passionate individuals who not only possess the requisite knowledge and skills, but also care for your business, brands, and customers.

Now train them. All personnel should receive continual training to use your social CRM system and communicate effectively with customers and with one another.

Training also means learning from one another inside your organization and discovering better ways to coordinate your efforts to enhance the customer experience. Encourage and facilitate the sharing of information among departments and hold regular cross-departmental meetings to tweak your social CRM strategy to perfection.



Have a feedback mechanism in place to monitor customer interactions and issue resolution. Customer feedback is essential to identify the need for training or adjustments to personnel.

Strategize and Systematize

Without a clear plan in place, social media campaigns become disjointed, exhausting, and a huge time suck. Your whole marketing department can spend an entire morning just sifting through email and responding to posts in discussion forums. With a clear strategy and efficient system in place, social CRM becomes more deliberate, efficient, and effective.



Craft a strategy that encourages participation and collaboration as opposed to control. Personnel need to feel free to engage with the community and show a little personality.

Budget Carefully

Social CRM may be less expensive than traditional marketing and advertising, but it's not free, and it does take time. Budget carefully to account for staff, content creation, paid placements, hosting fees, social CRM tool fees, and any consulting and agency fees.

Go with the Best Social CRM Vendor on the Market

If you've ever purchased a cheap tool, kitchen appliance, or electronics device, you know you save a little money up front, but you end up paying more for it in the long run. It's obsolete the day you buy it, functions poorly, and breaks before you get much use out of it.

The right social CRM solution is easy to use and feature-rich. Perhaps more importantly, it's developed by visionaries in the field who are passionate about social CRM and dedicated to keeping pace with the ever-changing social CRM landscape. It may cost more than the others, but it pays for itself in performance and results. (See Chapter 2 for additional details on choosing the right solution for your needs.)

Track Key Words

Set up Google Alerts (www.google.com/alerts) for key words related to your business and industry to discover not only *what* people are saying but *where*.

Measure What Matters

Set measurable goals for your social CRM efforts in general and for individual campaigns and choose the right metrics to measure impact and return on investment. Be prepared to adjust your strategy in response to data and analyses.



What gets measured gets valued, so measure what really matters to your brand's success.

Keep Your Eyes on Your Customers

Tap the power of social CRM for customer engagement, interaction, service, response, and quick issue resolution. Convert prospects into customers and customers into passionate advocates for your brand.



Take care of your customers, and they'll take care of you by driving business your way and teaming up with you to improve your business and what you offer.

Do Multichannel Campaigns

To maximize reach and impact, integrate your social media activities on all platforms, including your business blog, Facebook page, and Twitter and LinkedIn accounts. Your social CRM technology solution should provide tools to facilitate and automate the process.

Start Now and Fine-Tune Later

Start formulating social CRM goals and strategies right now. You're going to make mistakes; everyone does. Analyze the impact to figure out what worked and what didn't and make the necessary adjustments. Every mistake is an opportunity to improve, except the one critical mistake of not even getting started.

Appendix A

Social CRM Glossary



blog: Short for *weblog*, a personal or corporate, publicly accessible online journal frequently updated with posts that others can comment on. Your business blog is the central hub for all your social CRM efforts (see Chapter 3).

brand advocate: An influential community member who's usually the first one to know and share updates about a product, service, or business.

campaign theme: A specific topic connected with a specific community, brand, product, social environment, and corporate strategy around which you form your campaign.

campaign type: A campaign style selected based on the campaign's purpose and goals. Campaign types include engagement, event, informational, promotional, and transactional.

extended reach: The distance a message spreads as followers retweet (share your tweet with their followers) and their followers retweet and so on.

fan: Facebook users who've chosen to "like" a Facebook fan page and, as a result, receive updates from their page in their feed.

follower: People and companies who follow someone on Twitter to receive their tweets.

heat map: A dynamic graphic that indicates dates and times when your audience responds best to a call to action in connection with a specific campaign.

influencer: Individuals with an active social network who regularly share information about a business and its brands.

landing page: The first page you want visitors to see when they click a link in response to a call to action. It can also be a frame you add to the website you include in your social media update (Campaign Commander Social Edition feature). The frame can be fully customized and include a call to action, video, “tweet this”, “follow me,” and so on.

metrics: Valuable measurements that enable you to track and analyze activity from campaign initiation to lead conversion or purely gain a better understanding of your fans, followers, and website visitors.

monitoring: Listening to conversations about your business and brand in social media settings.

multichannel: Consisting of two or more social media venues, such as Twitter, Facebook, and YouTube. Campaigns must take a multichannel approach to reach the audience wherever they may be.

multitenant: Social CRM user management capability that serves organizational hierarchies and facilitates workflow management.

RSS feed: A technology that enables you to link social media accounts to your blog so that when you post content on your blog, it automatically appears on the social network of your choice. (RSS stands for Really Simple Syndication.)

social CRM: A collection of strategies and tools for marketing and managing customer relationships in social media settings such as Facebook, Twitter, and YouTube.

social media campaign: A soft-sell marketing campaign through social media that leads prospects through the sales cycle from awareness to purchase.

social media: Media created by and for members of a community that’s distributed over the web and is often produced through interactive dialogue.

social networking: The process of connecting and communicating in various social environments on the web.

social plugin: A feature that enables you to link your organization's website and blog to your social properties, such as a Facebook page or Twitter account. Plugins enable visitors to quickly access a social property by clicking the plugin, such as a badge that encourages the user to "like" a post or "Follow Me on Twitter."

social presence: An organization's footprint in various web-based social networks that makes the organization more available and approachable to customers and prospects.

social properties/assets: Everything you have online in terms of accounts and content, including your business blog, Facebook page, YouTube channel, and Twitter account.

social QR code: A dot-matrix bar code that can be scanned with a QR barcode reader or camera phone to obtain special deals or additional information about a product or service. (QR stands for Quick Response.)

social ROI: Return on investment from social campaigns and activities.

status update: A brief message that Facebook users post to let their friends know what they're doing, how they're doing, or what's on their mind. In addition to text, a status update may include a photo, video clip, link, or audio file.

tweets: Text-based messages on the Twitter platform limited to 140 characters in length that can be accessed by other Twitter users who've chosen to follow and receive updates from that user.

user generated content: Content created by the public via blogging, digital video, podcasting, forums, review sites, social networking, photos, and wikis.

web analytics: Measurements of user activities on the website that allow you to evaluate a campaign's success and calculate your ROI for each campaign.

Appendix B

Social Media Rule Book, Dummies Style

To help you with the first step towards social CRM success, the following is an example corporate policy, a Social Media Rule book *For Dummies* style. This is addressed to your employees, for your organisation to start using right now.

We encourage all personnel to engage with our customers and interact in social media circles that are relevant to our business, brand, and industry. While we don't want to stifle your creativity and self-expression, we do require that you adhere to a few do's and don'ts. By adhering to these policies and guidelines, you help protect our reputation, confidential information, and yourself.

Do's

- ✓ **Check and adjust privacy settings.** Social networking sites typically have default settings. Check and adjust the settings so that you feel comfortable with what you're sharing on the network.
- ✓ **Put relationships and customers first.** Seek out ways to improve each customer's experience. Listen carefully to their needs and, when possible, provide for those needs. Sometimes, a customer may just need to vent. Other times, we may need to make a change in the way we do business.
- ✓ **Identify yourself.** Whenever and wherever you post something, add your name or initials and, when appropriate, your role at the company.

- ✔ **Be real and responsible.** Nobody likes a phony. Be honest and do what you say you're going to do.
- ✔ **Be the first to correct yourself.** If you post something in error or that contains errors, correct it before anyone takes issue with it, if possible, or immediately after someone points it out. When correcting it, format corrections so that everyone can tell what you've changed.
- ✔ **Show respect.** Respect all individuals as unique human beings who may be dealing with their own issues. Being real and showing respect at the same time may be quite a challenge, but maintaining a balance is essential in preserving our reputation.
- ✔ **Specify on whose behalf you're speaking.** If you're speaking as an authorized representative of our organization, say so. If you're sharing your personal view, make that clear.
- ✔ **Honor copyright and fair use laws.** In short, don't use other people's stuff or share it without their permission unless it falls under fair use laws. Ask legal if you have any doubt.
- ✔ **Maintain confidentiality of "internal only" information.** Don't leak information, regardless of how hard someone pumps you.
- ✔ **Protect our organization's good name and reputation.** Success in social media hinges a great deal on trust, so for the benefit of everyone involved, don't say or do anything that might sully our reputation.

Don'ts

- ✔ **Don't engage in online disputes.** Doing so exposes you to the risk of getting wrapped up in a no-win squabble that leaves a lot of collateral damage in its wake.
- ✔ **Don't engage in inflammatory or inappropriate discussions about competitors.** Although it may sound like fun, attacking the competition usually reveals deep-seated insecurities. Focus on making us look good, not on making the competition look bad.

- ✔ **Don't communicate with the news media without PR's approval.** The messages we communicate and information we offer must be consistent and aligned with our strategy. Consult PR for guidance.
- ✔ **Don't post potentially offensive or insensitive content.** This includes anything defamatory, offensive, harassing, rude, crude, or in violation of any applicable law or any of our policies.
- ✔ **Don't cite or reference clients, partners, or suppliers without their approval.** They have reputations to protect, too.
- ✔ **Don't share financial information about our organization with anyone.** If you want to talk finances, you're pretty much restricted to discussing your own personal finances and government spending.
- ✔ **Don't post anything unless you want it to linger on the web forever.** Removing information from the social web is nearly impossible, even if you remove or delete it from the original source.

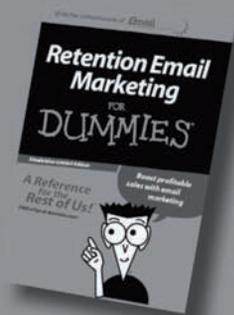
Enjoy success with
email marketing



*Retention
Email Marketing*
FOR
DUMMIES

Emailvision Limited Edition

Download your free
*Retention Email Marketing
For Dummies* ebook:
emailvision.com/dummies



emailvision 

Embrace the world of Social CRM

This book is like having your own personal social media consultant sitting at your desk. Optimize your social media impact without exhausting your resources. Discover how to harness the power of social media for lead generation, systematize your efforts to save time and improve results and launch and track multichannel campaigns from start to finish, while seeing what works and what doesn't with analytics.

- **Get keyed up** – explore the potential benefits of social CRM and review case studies to see it in action
- **Get geared up** – write your social media rules of engagement, design an effective system, implement the right technology and train your people well
- **Get started now** – ten tips for starting out right, staying on track and fine-tuning your system



Open the book and find:

- Social CRM policies and best practices
- Tips for recruiting and rewarding brand advocates
- Ways to automate your social media campaigns
- Steps for calculating your social ROI
- Tips to get your social CRM system up and running

Go to [Dummies.com](https://www.dummies.com)
for videos, step-by-step examples,
how-to articles or to shop!

Amita Paul is a global Director of Social Media Marketing at Emailvision. **Johanna C. Nilsson** is the founder and principal of Herringbone, a marketing communications firm. **Emailvision** is the worldwide leader in on-demand email and social marketing, providing excellence in technology and services for online relationship marketing.

For Dummies®
A Branded Imprint of



ISBN: 978-1-119-97719-3
Not for resale