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social media
monitoring +
engagement

Social Media Execution: The Journey



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CHAPTER 1:

Introduction

As of September 22nd, summer is officially over in North America. Many of you traveled during the summer vacation while your kids were out of school. And of those family vacations, especially in this economy, many of you chose to do a road trip. Will it take you until December to recover?

Executing a social media program is a lot like planning and going on a family road trip. If your vacation isn't well thought-out and meticulously planned, chaos may ensue. And a meltdown in a hot minivan with screaming children, stressed-out parents, and no immediate source of rest and relaxation isn't the type of vacation most families hope for.

Your organization resembles the family nucleus about to embark on an adventure, and the execution of this journey will determine whether or not you do the vacation thing again and remain on speaking terms.

So, let's not waste any time. What can you learn from taking a road trip that you can apply to executing a social media program? A few things, including:

- Begin with a roadmap.**
- Conduct a maintenance check-up.**
- Align your compass.**
- Decide who is in the driver's seat.**
- Captivate the backseat.**
- Fuel Up.**
- Arrange for rest and recuperation.**
- Establish a contingency plan.**

Let's get rolling!



CHAPTER 2:

Begin With a Roadmap

Traveling without a defined direction can be extremely liberating, but we're guessing that when it comes to business strategy and implementation, a roadmap is required. Some people shy away from a defined execution plan because they feel it hampers creativity and flexibility. However, there are many ways you can incorporate a roadmap without feeling locked into a specific set of steps. There will be bumps and detours along the way that can be addressed and driven through or even avoided with a living, breathing course of action.

There are different types of roadmaps to choose from depending on the level of comfort of the driver, navigator, and crew. You can go the traditional route of a paper map, upgrade to an installed GPS device, or perhaps rely on a third party, like AAA (or in this case, an agency), to consult and map out your trip. Whatever you choose, there are certain elements you must decide on before you get out on the open road.

Start by asking what your organization's motivation is to travel across this wild online space. For some organizations, social media is a big playground and moving industry conversations and relationships into that space is a natural progression. Others explore social media because executive management sees an article in a business magazine or hears about Twitter and other online channels through CNN or other mainstream sources.

Knowing what **you want out of social media** and preparing the foundation for growth is just the beginning of what your organization will require before executing your social media program. Locating your driving force for entering social media doesn't have to be an enigma if you've got a general idea of where inspiration tends to come from within your company's walls. Start by listening to your internal and external communities and exploring what your competitors and industry are doing to hone in on your company's perfect niche opportunity.

To get where you're going, you need to know where you've been and where you want to be, and that requires drawing a roadmap that **defines objectives and/or key performance metrics** that will show you if you're really making the most of the social web. Those measurable objectives should be specific, measurable, actionable, realistic and timely (following the SMART methodology) and directly correlate to your organization's big-picture goals for this program.

CHAPTER 3:

Conduct a Maintenance Check-Up

You won't be able to travel very far if your vehicle sputters to a halting stop a few miles in. No matter what the cause, an unscheduled stop that could've been avoided by taking proactive measures won't sit well with anyone in your travelling party. But usually it's the simple, routine check-ups that are quickly dismissed because there doesn't seem to be any time available to get them done. In the long run, these unscheduled stops will cost you more time, money, and resources than if you'd made time to complete those check-ups before your trip.

Check your fluids. Despite the fact that your plan might require only one or two departments actively executing its elements, multiple departments across your organization will be affected. Your entire organization needs to be aware of the plan, and you need to review the resources at your disposal. If your social media efforts ask for feedback, research how feedback is currently being handled and routed by other departments. Are response workflows already in place for other traditional feedback channels? Why reinvent the wheel? Determine if there are any gaps in the current model that you might run into. What can you do to proactively prevent the same response?

It may be sunny outside when you start out, but you have no idea when that random summer shower or thunderstorm may darken the highway. Check the state of your windshield wipers. There will be a lot of noise that will surround your social media efforts and you need to be prepared to cut through the clutter and see the path ahead. **Establish a listening grid and workflow to ensure you're listening to the right conversations and have the right employees or community members engaging with the right people at the right time.**

Air up your tires to absorb the shock of continuous travel and prevent a spin-out. Checks and balances should exist to prevent situations easily tended to with oversight. Avoid creating your social media roadmap in a silo and get the essential buy-in from



departments that may be indirectly affected and from those that will provide critical support and defense of you and community in times of crisis, your **legal and human resource teams**.

To get moving, begin your trip with a full tank of gas; be fully prepared before you head out on your journey. Having half-baked strategies, tactics, and uneducated resources will only cause you more trouble down the road. Keep an open mind. Open your discussion and listen to feedback from those who will be along for the ride with you. You don't have to take action on every idea or comment, but use the thoughts they give you to understand the current state of mind.

Close the feedback loop by telling those who gave you feedback what you'll do with their suggestions. Demonstrate they are being heard. You do not want to hit the pavement with blinders on or risk being caught off guard.



CHAPTER 4:

Align Your Compass

What is true north? Make sure not to influence your coordinates with personal bias. A social media campaign will turn into a program and have a longer shelf life and buy-in when the strategies that support it align with overall business goals. It's possible that your GPS may lose signal or you may find yourself in low-visibility situations, so be prepared with a Plan B map and compass. You don't want to be stuck in unfamiliar territory without a sense of direction, right?

Determine the direction the north end of your compass needle points (the overall direction of your industry) and true north (the direction of your organization) and set your compass for that variance. Orient your map so your strategies and tactics point toward true north. Place the compass on the map so the direction arrow points from your current position to your intended destination. Get your heading. Refer back to your SMART objectives if you become disoriented with the number of social media outposts and content creation opportunities available.

When, not if, obstacles push you off course, note the compass bearing of the direction you're driving and pay attention to how much time you've spent off-course. Take time to evaluate why you were driven off the plan strategy, and determine if this obstacle may appear in the remainder of your journey. How do you need to prepare for avoiding this obstacle in the future? It's easy to get flustered when you veer from your plan, but use that time wisely to evaluate and steady your course direction. After skirting the obstacle, return to your original course and resume primary heading.



CHAPTER 5:

Decide Who is in The Driver's Seat

A road trip may be a long and tiring endeavor, and it may prove unwise and even dangerous if only one person takes the driver's seat. Before getting on the road, identify all those in your traveling entourage who are qualified to drive. Keep in mind, there is a difference between a qualified driver and one who is experienced. In the beginning, you may want to opt for the experienced driver to take the wheel, and when you hit a long stretch of highway in the middle of nowhere, hand the wheel over to a less experienced, but qualified driver, so they can get some miles under their belt.

The command and control model is no longer the preferred method of choice for interaction between organizations and their communities. Sometimes the driver won't be a member of your workforce, but a leader within your community. Sometimes the entire community will be the driver and the organization the navigator. **Finding your social media superheroes** is a great first step to building your guiding team; however, you need more than the social media savvy to make your vision a success! Don't forget to invite your harshest critics into the fold (like your **legal team**). Learning up front what their concerns are and inviting them to help you overcome those obstacles is the quickest way to establish buy-in and help the **enterprise socialize**.

It may benefit your organization to integrate **roles and responsibilities of a community team**. For example, your organization may want to have a traffic operator or a full-time role dedicated to monitoring for your brand to ensure all relevant posts get to the right members of your team for engagement and response. This person's job is to filter the posts as they come in using an established process to properly tag, classify, and assign posts to the right folks across the organization.

Many social media plans generate a lot of buzz upon execution. Your organization will need to have an engagement team in place to help with the response as it gets handed off from the traffic coordinator. The people on this team may be dedicated community managers, customer service representatives, or other passionate and trained employees. These members ensure your organization is responding in an active, accessible, and timely fashion to commentary around your brand. They answer questions, contribute to the larger industry discussion through blog comments, and participate in your outpost communities (i.e., Twitter, blogs, and LinkedIn).

It's fair to say that while the community team might be on the front lines, they will probably closely and frequently with all different departments in your organization, because community touches just about everything. From your partnership team to your support, training, professional services, development, product management, executive, and sales and account management teams, they'll have reason and need to interact with and support all of them at one point or another.

CHAPTER 6: Captivate the Back Seat

That back seat is a tough crowd to please. You can only play mindless games like the alphabet license plate game for so long before the crowd becomes restless. The back seat needs to have an emotional investment and vote in the ultimate destination of your road trip and any stops made along the way. **Any department in your organization that has direct interaction with or structures any process around customer touch points needs to understand the road trip vision and believe in it before you hit the road.**



This process doesn't have to be like pulling teeth. Remember, if your social media strategies and objectives are aligned with your organization's business goals, then the entire company and stakeholders have a stake in the journey. Communicate buy-in by speaking the language of your organization—no, not the acronym or business lingo. Think of water cooler and coffee break discussions. Communicate clearly and establish an emotional bond by explaining how their buy-in will address their concerns and anxieties.

Cut through the clutter of other business endeavors and communicate the vision in channels outside of the norm to help generate excitement. Keep it simple. Go beyond the memos and form emails and find ways to incorporate feedback. Consider how to do a test run of this road trip with your organization first, and give your folks the comfort of internal dialogue before opening up to external communities.

Sell your social media program and show how the new principles and change of thought processes behind it will aid workflow and align with business goals. If your organization does integrate the roles of an engaged team, these community managers or representatives aren't meant to be on an island somewhere operating independently, but rather touching and supporting many of the other areas of the organization to deliver content, provide insights and feedback, deliver subject matter expertise, and act as a bridge both inside and outside the organization.

CHAPTER 7:

Fuel Up

You may have begun with a full tank of gas, but things like your acceleration rate, the number of hills you have to drive over, and the amount of times you have to turn on/off your cruise control will impact exactly when you need to stop for a refill. Just as you have to plan fuel stops and be aware of how many gallons you have left in a tank before the next station, you also need to establish benchmarks to assess your social media plan execution.

It's easy to get wrapped up in all the things we want to do during our road trip or big-picture social media plan. Often times, to succeed in getting buy-in for turning your social media campaign into a viable program and integrating it into the business, you have to score some small wins to give those in the driver or navigator seats a warm and fuzzy feeling.

So, at the beginning of your road trip, you established SMART objectives as part of the roadmap. Make sure you've communicated these objectives to your entire organization. Think about long-term goals, but don't forget to include short-term wins that'll get the ball rolling to secure social media as an integrated business function. During the road trip, create and share progress reports on the vitality of your vehicle. Stop the naysayers in their tracks by informing your team, department, and organization of the status of your measurable objectives—tell them what you've achieved.

Demonstrating the success of the road trip will build momentum and calm general resistance. Don't focus so much on the stats and numbers of your measurable objectives in the progress reports, but share the feel-good stories and relationship-building that is occurring in and outside the vehicle of your program. Also, avoid being sidetracked with destinations outside your decided benchmarks and ultimate destination. Shiny tools will come and go just like the world's largest ball of yarn you just passed on the highway. Stay on course towards true north.

CHAPTER 8:

Arrange for Rest and Relaxation

Arriving at your destination can't really be enjoyed if you've driven straight through without pit stops or breaks to enjoy the scenery. Social media program execution is both a journey to be enjoyed and a learning experience. If you don't periodically stop and take a look around, you may not realize you've got a leak in your tire or low blood sugar.



By integrating social media, organizations have an incredible opportunity to reevaluate old policies and controlling behaviors. Your organization's social media plan could be realized quickly and effectively if you remove obstacles and encourage smart participation in social media—making way for your internal teams to influence their communities is essential to social media success.

If the driver and navigator are always on the defensive, the trip won't be pleasant for your organization or its community. Begin by setting expectations for the folks riding in your vehicle, a.k.a. your organization. It's vital to provide **clear guidelines** for engagement and disclosure, so that all employees can represent themselves and the company clearly and professionally. By allowing your workforce to do what they do best and act as your representatives, your organization can gain valuable social capital, credibility, and opportunity. Reward their enthusiasm and let them dine and sleep in a five star hotel for one night.

Your ultimate goal is to enjoy the road trip, so future adventures are possible. You don't want to hamper the success of those driving or navigating by scolding them about mistakes they make along the way. Let's be realistic. A scratch on the bumper or dent in the fender is going to occur. Mistakes are how we learn and should be prepared for when they do happen. Having clear guidelines in place will lessen these instances, but also by giving constructive feedback and remaining positive will encourage future behavior promoting ideal interaction.

CHAPTER 9:

Establish a Contingency Plan

Despite the most meticulous planning, there will inevitably be times when you'll have to deal with the unexpected nail in the road or a cranky passenger. This fact means you need to prepare for those setbacks and for getting to that next stop no matter what happens. Always have a Plan B, or even a Plan C for that matter.

Contingency plans should be developed for every critical function of the vehicle and for unplanned but necessary stops along the way. Remember National Lampoon's Vacation and when Walley World was closed? Review all possible alternatives and identify the best alternative for your situation. These plans will vary with each business function, process, and intended purpose. Contingency plans can range from very simple to very complex; design each plan based on your organizational needs.

Some items you'll want to have in your trunk in the event of an unforeseen "adventure" during your road trip:

- *Flares: No need to reinvent the wheel; adapt your organization's crisis communications plan to account for your social media program.*
- *Spare Tire: Avoid having your entire social media program rest in the hands of one person. Get more people involved to carry the weight of monitoring and engagement.*
- *Blankets: Integrating your organization's social media program as another layer within your overall business communication/process will ensure you are never left out in the cold.*
- *Food and Water: Explore how traditional programs, like your CRM system and data capture process, can give your vehicle an extra boost of sustenance to power through long stretches.*
- *Compass: Never leave your organization without it. Always keep that compass handy to double check if your social media program is on course toward true north.*

CHAPTER 10:

Wrap-Up

Note that the majority of necessary steps and actions occur before the road trip even begins. Strong, fluid execution of any social media program happens out of a purposeful and carefully planned strategy. Just like your family can't jump into a car and drive without direction, your social media program can't exist or thrive on tactics and tools alone. With this guide in your glove compartment, you should be ready to hit the road.

Still Unsure?

No matter how much you know, actually planning that social media journey can still remain a daunting task. If you're still wondering how to get started, just give us a shout. We're here and ready to help you set your social media route, select the most valuable and fun stops on your way to your final destination, and make sure you've got everything you need in terms of resources and backing to get there. Reach out to us if you'd like that extra support—we're here to help.

Have comments, questions, or feedback? Just let us know!

Ready to begin your road trip?

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