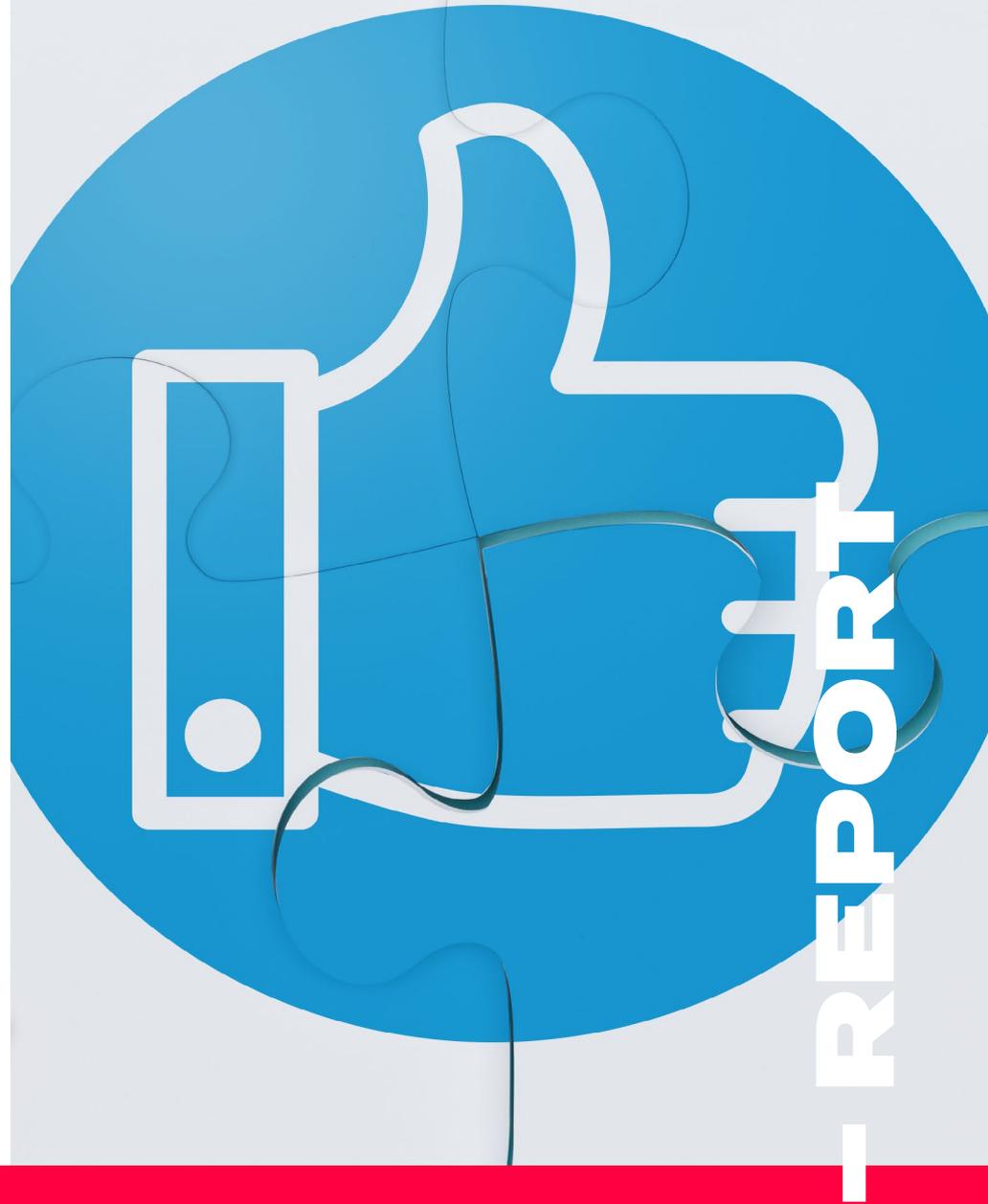


Econsultancy



Best Practice Guide

# Social Media Strategy

This report aims to identify best practice approaches, techniques, measurement considerations, challenges and opportunities for creating your social media strategy.

# Social Media Strategy

## Best Practice Guide



**Published August 2019**

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# 1. Introduction

This guide has been written to complement Econsultancy's [Social Media Platforms Overview](#).

Its purpose is to provide a framework for developing a social media strategy as well as a summary of the main considerations for marketers when developing a strategic approach to social media marketing and communications.

## 1.1 About this report

In the last few years, social technologies have had a disruptive effect on many organisations, making them rethink their ways of working and communication and the relationship they have with their customers and other stakeholders. As social media touches so many areas of the organisation, the process of getting it 'right' has been transformative for many.

Social media is a fast-moving area of digital but also one that touches most internet users. Globally, there are 3.534 billion global social media users. That's 46% of the world's population.<sup>1</sup>

The platforms continue to evolve at a rapid rate. The knowledge and skills required to ensure social media success have broadened. Marketers still need to be brilliant communications, community, content and comms specialists, but more sophisticated ad offerings, the need to manage data and the developing s-commerce functions on the platforms requires a very mixed skillset.

As the platforms evolve and social media moves beyond the domain of brand marketing/communications and further into research, innovation, customer experience and commerce, organisations need to rethink their structures, skills and support and approach social media in a highly strategic way.

Social media is a vast topic. To make it more manageable, Econsultancy has created complementary social media guides as recommended reading:

- [Social Media Platforms Overview](#)
- [Social Media Advertising Best Practice Guide](#)
- [B2B Social Media Best Practice Guide](#)

## 1.2 Research aim and methodology

The aim of this research is to identify best practice approaches, techniques, challenges and opportunities for creating a social media strategy.

The methodology involved two main phases:

- **Phase 1:** Desk research to identify relevant issues, examples and models.
- **Phase 2:** A series of in-depth interviews with a range of senior digital and non-digital marketers, communications leads and social media strategists. Interviewees for the research covered sectors as diverse as manufacturing, software vendors, publishing, arts and culture, retail, aerospace, charity, business services, hospitality, public sector (including government), SaaS, FMCG, non-profit, agency, financial services and media.

<sup>1</sup> <https://wearesocial.com/uk/blog/2019/07/global-social-media-users-pass-3-5-billion>

## 1.3 About Econsultancy

Econsultancy's mission is to help its customers achieve excellence in digital business, marketing and ecommerce through research, training and events.

Founded in 1999, Econsultancy has offices in New York, London and Singapore.

Econsultancy is used by over 600,000 professionals every month. Subscribers get access to research, market data, best practice guides, case studies and elearning – all focused on helping individuals and enterprises get better at digital.

The subscription is supported by digital transformation services including digital capability programs, training courses, skills assessments and audits. We train and develop thousands of professionals each year as well as running events and networking that bring the Econsultancy community together around the world.

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Contact [help@econsultancy.com](mailto:help@econsultancy.com) to find out more.

## 1.4 About the author



The lead author for this social media guide is Michelle Goodall. Michelle is an experienced consultant. She has more than 20 years' of B2C and B2B experience, client and agency side, providing digital transformation and social media strategy advice and support.

She has worked with a wide range of clients, including the Victoria and Albert Museum, London 2012, BBC, Viacom, Direct Line Group, Multiple Sclerosis Society, Barclays, The Coca-Cola Company, Unilever, the US Embassy and many others.

## 1.5 Expert contributors

The author and Econsultancy wish to extend sincere thanks to the following respected professionals who have contributed to the report:

- **Florence Adepoju**, Founder, MDMflow
- **Annie Andoh**, Social Media Manager, Victoria and Albert Museum
- **Richard Bagnall**, CEO, PRIME Research UK & SVP PRIME Research Europe
- **Tom Barker**, Head of Digital, National Trust
- **Sophie Brendel**, Director of Marketing & Communications, Victoria and Albert Museum
- **Martin Carter**, Social Media Manager, University of Leeds
- **Albert Hogan**, Director, Group Marketing, Audience & Digital Development, Penguin Random House
- **Will McInnes**, Chief Marketing Officer, Brandwatch
- **Anna Rawcliffe**, Digital Manager, Social and Engagement, National Trust
- **Alison Spray**, Director of Data and Insights, H&K Strategies (AMEC Board Member)

- **Kerry Taylor**, EVP, MTV International and Chief Marketing Officer, Viacom UK at Viacom
- **Pete Wallace**, Commercial Director, GumGum
- **Helen Wood**, Planning Director, H&K Strategies
- **Ingrid van der Zalm**, Director Small Business Marketing and Communications, UPS Europe Region

The author and Econsultancy would also like to thank contributors to the previous report whose contributions are still highly relevant today:

- **Mark Frankel**, Social Media Editor, BBC News
- **Jeff Semones**, Managing Partner, Head of Social Media, MediaCom

## 1.6 Executive summary

- **Social media platforms continue to evolve at a rapid rate.** Recent considerations for social media strategists include: data and consumer trust issues, growth in private messenger platforms, improved ad targeting, richer visual content experiences, live, immersive and long-form video, social commerce and evolving methods of working with influencers in social.
- **Social media is maturing.** A mature strategy considers broader business objectives outside of typical brand marketing/communications.
- **Planning social media activity should mirror any strategic element of the business** and align to multiple departments' and teams' needs, whether that is to support research and innovation, product development, sales, HR, marketing or communications. It can create both business value and efficiencies.
- While all organisations are different, **the most common operating model for social media is 'hub and spoke'** and the most common social media role is Social Media Manager.
- **Audience segmentation and customer journey planning is critical** in the development of the optimal mix of social channels, messages, content etc. Effective social media without an anchoring content strategy simply is not possible.
- **Reorganising, developing internal skills, integrating teams and clarifying agency and internal support is required.** Global organisations must consider global, local, or a blended 'glocal' approach to content and social media.
- **Alignment to crisis and issue management is a critical part of a resilient social media strategy.**
- **Alignment to a content and content marketing strategy is fundamental to doing social media 'well'.**
- **Social platforms have developed tools such messaging to improve customer experience and customer service design.** Mature strategies have aligned servicing into social media platforms.
- **The growth of mobile native, highly visual social platforms such as Instagram and Snapchat, and the increased use of emojis in user generated social content, has transformed social media posting** as well as listening, research and analysis.
- **The growth of 'dark social' shares of social content in platforms such as WhatsApp and through other methods has created research and brand tracking challenges for marketers.** It also makes measuring the attribution value of social media for conversion objectives (tracked via web analytics) much more complex.
- **Efficiencies or ROI must be proved before social media teams can invest in the right technology and tools.** There is a plethora of social tools out there.
- **The days of generating social media follows, likes and engagement for the sake of it are thankfully well behind us.**

- **Algorithm changes mean that a strategy relying on organic reach only is limited.**
- **Marketers must not focus on output metrics in social.** They should identify shared visions of success and how each team and department measures this. Consider rolling social into brand building retention and advocacy, which can be harder, but not impossible, to measure.
- **Considerable strides have been made towards a set of measurement standards** for social media and there is a small improvement in consistency between what the major social platforms measure.
- **Social media specialists recognise the need to improve how they present insights** and to not overstate the importance of social data. It must be part of an organisation's broader approach to qualitative and quantitative research.
- **User expectations in social media have significantly increased.** There are rewards from both the platforms (algorithmically) and users (attention and action) when organisations create impactful, mobile-first, quality visual and video content.
- **A commitment to ongoing skills development in social media is important.** The sheer complexity and breadth of a typical social media marketing specialist's role requires staying up to date with many changes as the platforms, usage and technology evolve at a rapid rate. It is arguably the most dynamic area of marketing today.

# 2. Defining Social Media

## 2.1 What is social media?

Interviewees for this report indicated that the definition of social media is very broad.

For many, their social media strategy is focused on an evolving set of channels for fulfilling sales and marketing-related objectives, including driving awareness, customer acquisition or loyalty.

For others, their social media strategy has developed as a natural extension of their wider communications strategy, providing them with a set of evolving technologies to reach their audiences, customers and other stakeholders.

For some, there is a focus on social as an integral part of developing customer experience that sets them aside from the competition and provides data and intelligence for continual improvements. Service organisations are focusing their social media strategies to evolve the customer experience in these channels; they view social networks as places where increasingly large numbers of their customers are happy to seek help and resolution.

Intellectual property owners view social media as a rapidly evolving set of digital channels to meet the ever-changing content demands of their audiences, one that offers the opportunity to develop profitable business models and meet audiences in the platforms where they spend time connecting to friends and family.

All interviewees recognised that an effective social media strategy must be incorporated into an end-to-end process covering all these aspects and must be rooted in their organisation's culture, vision, mission and aims as well as have measurable objectives and Key Performance Indicators.

As such, social media strategies and governance are rarely the sole responsibility of the marketing, digital, communications or customer servicing teams. Many organisations have had to consider some form of restructure, often when the value that social media provides to an organisation comes under scrutiny.

### Expert view

“Social media is so tough to define and get right for many organisations because it touches so many areas. Many people think about the obvious: PR and thought leadership, content marketing and acquisition using the major social platforms.

“But social is also a fundamental part of loyalty, retention, advocacy, customer experience and customer service. It needs to align to community development and management, affiliate marketing, influencer marketing, employee advocacy and ‘social selling’, collaboration through enterprise social networks, marketing automation, research and analytics.

“Whilst mature in China, 2019 has been the ‘Year of Social Commerce’ in the US and Europe. Instagram and Pinterest have developed substantial commerce and advertising features.

“Getting a social media strategy ‘right’ has been an important digital transformation lever for many organisations.”

— Michelle Goodall, Consultant, report author

Traditional attempts to provide definitions focus on the idea that social media is a web-based technology with the ability to bring people together and allow one-to-one or one-to-many communication. Yet this provides too broad a definition as it can also be true of email or instant messaging.

The following subsections will provide an up-to-date definition of what social media is, and what it means today.

## 2.2 Characteristics of social media

Social media platforms, both old and new, share some common DNA:

- They are web-based technologies.
- They require some form of sharing or receiving of user-generated content or information (video, image, audio, text, etc.).
- They require user to create profiles for the site or app, which are designed for and maintained by the social media platform provider.
- They encourage the development of closed or open communication by connecting a user's profile with those of other individuals and/or groups.
- To a greater or lesser extent, they provide features that encourage virality of the user-generated content published on them, through functions such as 'share' or 'retweet' and through the wider network enable greater visibility of content by using context providers such as hashtags or tags.

## 2.3 Categories of social media

Social media is one of the big success stories of the modern web. Econsultancy's [Internet Statistics Compendium](#) and [Internet Statistics Database](#) have gathered many useful social media usage statistics over the years. It is broadly a story of user growth, platform maturation/diffusion and big players acquiring, nullifying or replicating emergent platforms and their successful features.

Brian Solis was an early advocate of brands and organisations adopting and evolving to 'Web 2.0' and the engagement media technologies that defined it, such as wikis, blogs, microblogs (Twitter), social networks (MySpace, LinkedIn, Facebook) and video/image sharing (YouTube, Flickr).

He was one of the first people to categorise and make sense of an evolving set of social media platforms and tools with his Conversation Prism in 2008. He described this as *"an ongoing study in digital ethnography that tracks dominant and promising social networks and organises them by how they're used in everyday life"*.<sup>2</sup>

<sup>2</sup> <https://conversationprism.com/>

Figure 1: Brian Solis' Conversation Prisms, v1.0 (2008) and v5.0 (2017)



Source: Brian Solis and JESS3<sup>3</sup>

<sup>3</sup> <https://conversationprism.com/>

In 2008, blogs, Wikipedia and Twitter were the disruptive technologies and the conversation prism had 22 segments. Today, the prism has 28 segments with significantly more platforms. The evolution highlights the growing importance of social commerce, the quantified self (e.g. Strava) and enterprise social networks (e.g. Yammer, Salesforce Chatter, Facebook Workplace).

**Table 1: Categories of social media with current platform examples**

Category of social media	Example platform / technology / app
Crowdfunding	Kickstarter, Fundable
Messaging	Facebook Messenger, WhatsApp, WeChat
Quantified self	Fitbit, Strava
Influence	Traackr, Brandwatch
Social bookmarking	Mix, Pocket
Imagery	Instagram, Imgur
Livestreaming	Twitch, Periscope
Music	Spotify, SoundCloud
Events	Meetup, Eventbrite
Content networking	Dropbox, Google Drive
Video	YouTube, Vimeo
Social curation	Pinterest, Flipboard
Reviews and ratings	Yelp, Trustpilot
Service networking	TaskRabbit, Upwork
Business networking	LinkedIn, GitHub
Discussion forums	Reddit, 4chan
Wiki	Wikipedia, Wikivoyage
Enterprise messaging	Slack, Trello
Nicheworking	Goodreads, Whisper
Location	Swarm, Facebook (check-in)
Social streams	Feedly, Juicer
Social commerce	Pinterest, Instagram
Social comments	Disqus, Muut
Q&A	Quora, Ask.fm
Blog/microblog	WordPress, Twitter, Sina Weibo
Social networks	Facebook, Qzone
Connecting IRL [in real life]	Bumble, Tinder
Travel and hospitality	Airbnb, FlipKey

Source: *ConversationPrism*<sup>4</sup>

Solis is described as a digital anthropologist in his Wikipedia entry. His landscaping model has provided a useful visual study of how the adoption and use of social technologies is evolving

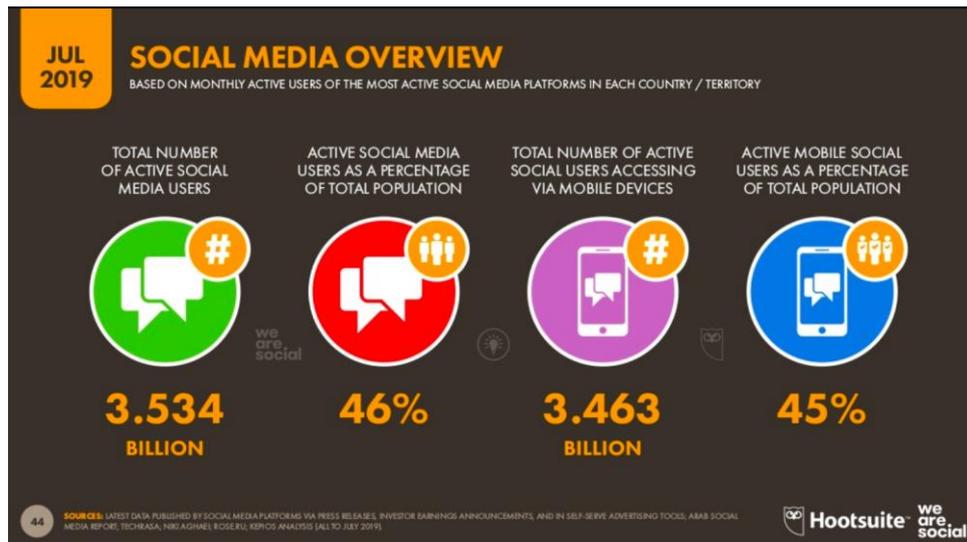
<sup>4</sup> <https://conversationprism.com/>

rapidly over a very short space of time. The model is useful guide to categorising the social media ecosystem ahead of developing a social media strategy.

## 2.4 The evolution of social media

Social media touches most internet users. According to the annual study published by We Are Social and Hootsuite, there were more than 3.534 billion global active social media users in July 2019, representing 46% of the world's population.<sup>5</sup> The same research states the largest global platforms, in terms of active users, are Facebook, YouTube, WhatsApp, Facebook Messenger, WeChat and Instagram.

**Figure 2: Global social media penetration**



Source: We Are Social<sup>6</sup>

It also shows that Facebook, YouTube and WhatsApp have the most active social media users globally and that Instagram has passed the 1 billion user mark.

The story for 2019 has been one of growth for most of the major platforms, with YouTube, WhatsApp, WeChat and Instagram seeing the most significant jump in user numbers.

TikTok is a new high growth platform for 2019. It is the overseas version of the successful Chinese app Douyin. The three- to 60-second-long, highly sophisticated short-form meme, joke, dancing, prank, tutorial and lip-syncing videos suddenly seemed to be everywhere and the app became the most downloaded social app in the US.<sup>7</sup>

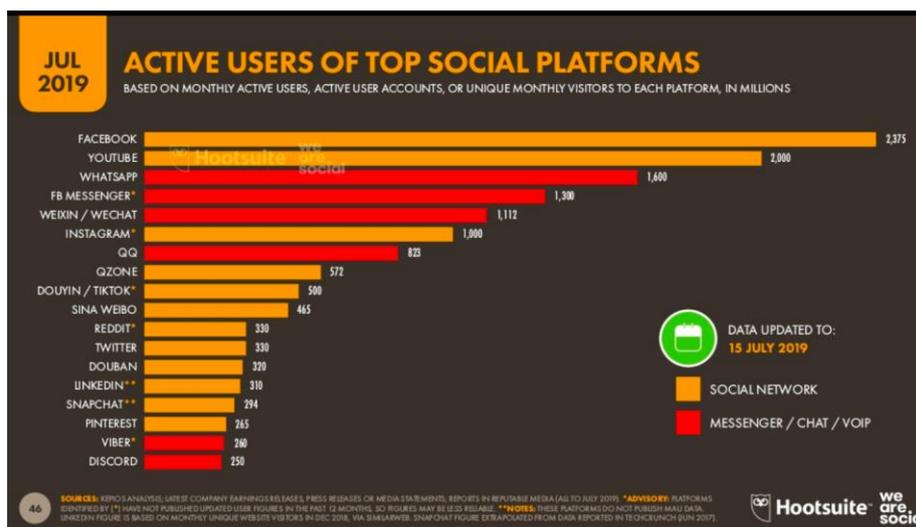
TikTok, like Snapchat before it, has brought a sense of fun back to social media and appeals to a young audience. The major players will be monitoring its growth closely and analysing how users, brands and creators/influencers react.

<sup>5</sup> <https://wearesocial.com/uk/blog/2019/07/global-social-media-users-pass-3-5-billion>

<sup>6</sup> <https://wearesocial.com/uk/digital-2019>

<sup>7</sup> <https://techcrunch.com/2018/11/02/tiktok-surpassed-facebook-instagram-snapchat-youtube-in-downloads-last-month/>

Figure 3: Global active users of social platforms



Source: We Are Social<sup>8</sup>

## 2.5 Key trends in social media

The key trends in social media can be summarised as:

- Data and consumer trust issues
- Growth in user numbers
- Growth in private messenger platforms (Facebook Messenger, WeChat) and smaller, closed groups in social networks
- Maturing advertising offers
- Canvas or story formats for richer content experiences
- Live video and long-form video
- Immersive video formats (360, virtual reality)
- Improved data and analytics
- Social commerce
- Social media customer service
- Enterprise social
- Influencer > advocate marketing.

Econsultancy's complementary guides [Social Media Platforms Overview](#) and [Social Media Advertising](#) also explore some of the above trends in more detail.

This section will briefly summarise some of the key trends that many organisations are having to adapt to.

## 2.6 Facebook Apps and WeChat's developing ecosystems

Facebook bought Instagram in 2012 to improve its photo sharing features and acquire its then 200 million users. It then spent a tenth of its market value to acquire WhatsApp in 2014. The

<sup>8</sup> <https://wearesocial.com/uk/digital-2019>

acquisition of WhatsApp was an attempt to boost mobile users and Facebook growth in developing markets where internet connectivity is patchy but WhatsApp is widely used.

It is an interesting time for mature social networks as mobile messaging platform use grows and the more 'social' elements of communication become dwarfed by messaging features. The number of people using Facebook Messenger is staggering: 1.3 billion people worldwide are users.<sup>9</sup> The instant messaging service is available to anyone, whether they have a Facebook profile or not.

WeChat is China's number one social media app, but is yet to gain significant traction outside China. It is a WhatsApp, Facebook, web portal hybrid, with the social applications of both and much more besides, including Shake (a Tinder-like feature that allows users to connect random users close to their locations who are shaking their phones while on the app), stickers, workgroup features and voice and video calls.

WeChat exemplifies a mobile-first social platform approach. Using elements of other social apps, it bundles in as many in-app features as possible, keeping users in the application. Its payment wallet WeChat Pay has 900 million monthly active users<sup>10</sup> who are used to paying for everything from goods and services as well as transferring money to other users.

It has also created a successful ecosystem called Mini Programmes where users can access more than 580,000 native app-like experiences without leaving the WeChat platform. Examples include games and offline use cases such as unlocking a shared bike or paying for fuel at a petrol station.<sup>11</sup>

It is fair to say that 'social is a feature, not the focus' for the Chinese platform.

WeChat developments over the years have often preceded significant Facebook developments. Facebook is in the process of redefining its core app away from the news feed and towards groups and events.

It is also establishing Instagram as the primary social commerce platform with the launch of shoppable post formats, closer shopping integration and Instagram Checkout, a feature that allows brands and content creators to sell directly within the app.

With Instagram Checkout, users no longer have to click to an external site to buy, register and check out. Customers can track, manage and return their purchases through the app, as well as contact brands about their orders directly. Users are also able to buy products and manage their entire purchasing journey, all within the Instagram app.

## 2.7 Social media payment wallets and cryptocurrency

Although WhatsApp, Instagram and Facebook exist as separate apps, the latter has announced its intention to integrate messaging elements of the former platforms to ensure content portability and sharing across them.<sup>12</sup>

Alongside this, Facebook has announced its plans to launch a decentralised cryptocurrency named Libra.<sup>13</sup> Initial announcements suggest that initially Libra will be an intermediary for the transfer of traditional currencies and will enable peer-to-peer payments within Facebook's messaging apps Messenger and WhatsApp.

Facebook has also announced the launch of a connected company called Calibra, which will develop a payments wallet and products and services around the currency. Eventually, Facebook

<sup>9</sup> <https://www.facebook.com/business/products/messenger-for-business>

<sup>10</sup> <https://www.businessinsider.com/alipay-wechat-pay-china-mobile-payments-street-vendors-musicians-2018-5?r=US&IR=T>

<sup>11</sup> <https://econsultancy.com/super-mobile-apps-china-to-the-world/>

<sup>12</sup> <https://www.bbc.co.uk/news/technology-47001460>

<sup>13</sup> <https://libra.org/en-US/white-paper/#introduction>

hopes Libra will be accepted as a form of payment, and other financial services will be built on top of its blockchain-based network.

Facebook, like WeChat, is slowly but surely cementing its status as a fundamental part of the web's infrastructure rather than simply being a platform that other services sit on. Time will tell how this will be viewed and regulated by the world's lawmakers.

## 2.8 The changing face of social content

Stories have overtaken classic posts in the feed in Instagram and this content format is available on almost every major network.

Facebook has added Stories to personal accounts, Pages, Messenger and Groups. WhatsApp and YouTube have also invested in story-like features and even LinkedIn has tested them.<sup>14</sup>

Today, Instagram Stories have the most functionality, evolving from basic features and video modifier effects such as Superzoom and Rewind, stickers and gifs, through to Snapchat-esque face-filters to engagement features such as emoji reactions, polls to add new levels of creativity to brand storytelling. Integration with shopping features will only increase the content formats' appeal to brands.

There is no sign of the popularity of stories waning, so marketers should start incorporating the format into their organisation's strategy if it is not there already.

The New York Public Library has some of the best examples of Instagram Stories, using the format to digitise novels such as Lewis Carroll's *Alice's Adventures in Wonderland* (Figure 4).

**Figure 4: The New York Public Library has some of the best examples of Instagram Stories**



Source: The New York Public Library's Instagram account<sup>15</sup>

Smart marketers are also leveraging their brand assets for stories users, considering which layers can provide value and encourage use among people who like to use elements such as stickers or gifs.

<sup>14</sup> <https://techcrunch.com/2018/11/20/linkedin-stories/>

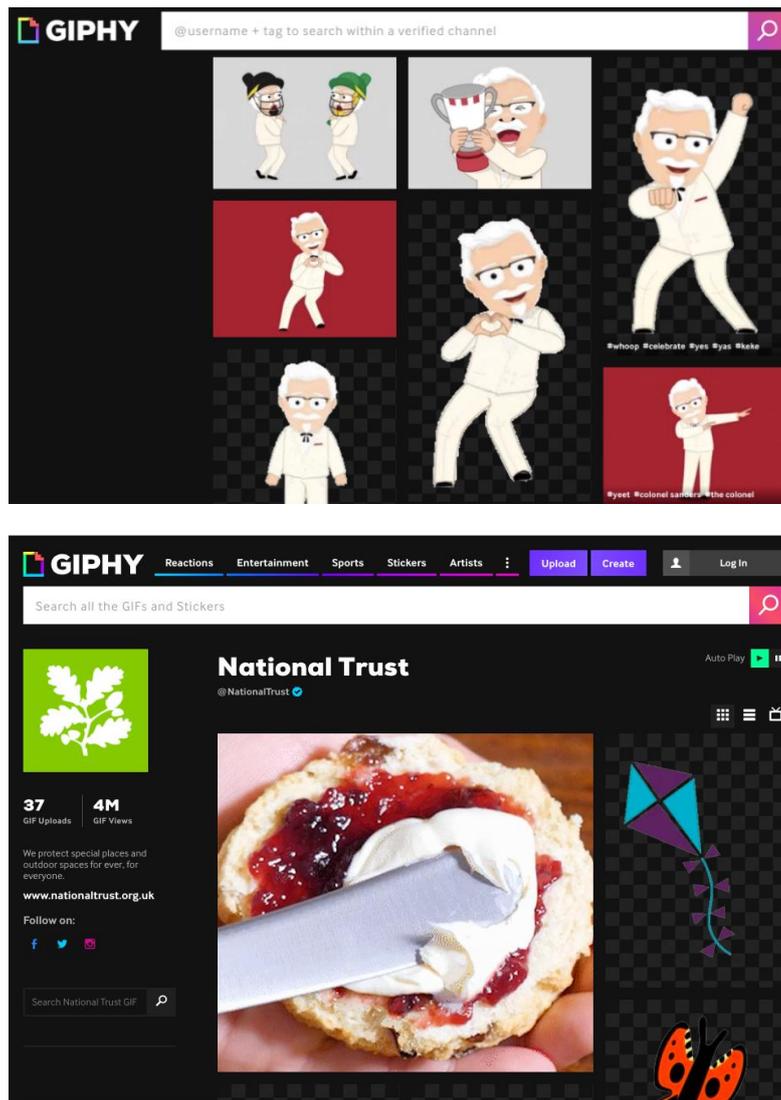
<sup>15</sup> <https://instagram.com/nypl>

Unsurprisingly, brands with established characters, such as KFC's Colonel Sanders, have created instantly recognisable stickers and gifs that users can simply add, or layer, to their Instagram Stories or share via WhatsApp.

On KFC Australia's Giphy account, the Colonel performs Fortnite-inspired dance moves that have become part of children lives as well as footballers' goal celebrations such as 'The Floss' and 'The Dab'. He wears a KFC bucket on his head (users can pick their favourite colour) and plays air guitar with a cricket bat to celebrate the Cricket World Cup.

One of this report's contributors, The National Trust, has been successfully experimenting with stickers – which may feel counterintuitive given its perceived older audience. However, the organisation's content has seen more than 2.7 million views in only a few short months, and so it feels the experiments have been worth the small investment (Figure 5).

**Figure 5: Examples of KFC and The National Trust's brand asset stickers and gifs**



Source: KFC Australia<sup>16</sup> and National Trust<sup>17</sup> Giphy Accounts

Another key trend is the move towards long-form original platform video content, to compete with YouTube and video on-demand services such as Netflix and Amazon Prime. The pivot to long-

<sup>16</sup> <https://giphy.com/gifs/kfcaustralia>

<sup>17</sup> <https://giphy.com/NationalTrust>

form video is unsurprising, as it allows the platform to provide more inventory and options for advertiser and encourages users to stay longer within the platform.

Facebook Watch has not quite achieved the predicted success with its investment in original episodic TV content, despite working with celebrities, sports and movie stars including the Kardashians, Jada Pinkett-Smith and Will Smith.

Facebook launched IGTV as a standalone Instagram video app in June 2018 in direct competition to YouTube. Brands, with notable exceptions of some broadcasters and publishers including Refinery 29, BuzzFeed and Vice, have been slow to adopt IGTV. This may be because of time investment required to produce long-form social videos for a platform with poor content discovery and search functions when compared to YouTube.

What may happen is that eventually IGTV and Facebook Watch will become less like separate platforms and features and more like a single one that is available as a feature across all Facebook products.

Snapchat has also entered the original long-form video content space with its Snapchat shows, called Snap Originals.

The Discover part of the platform now contains episodic series. One of its most popular is the reality show Bringing up Bhabie, starring 15-year-old rapper Danielle Bregoli. The programme had 10 million viewers in 24 hours when it debuted in January 2019, making it the biggest premiere in Snapchat's history.<sup>18</sup>

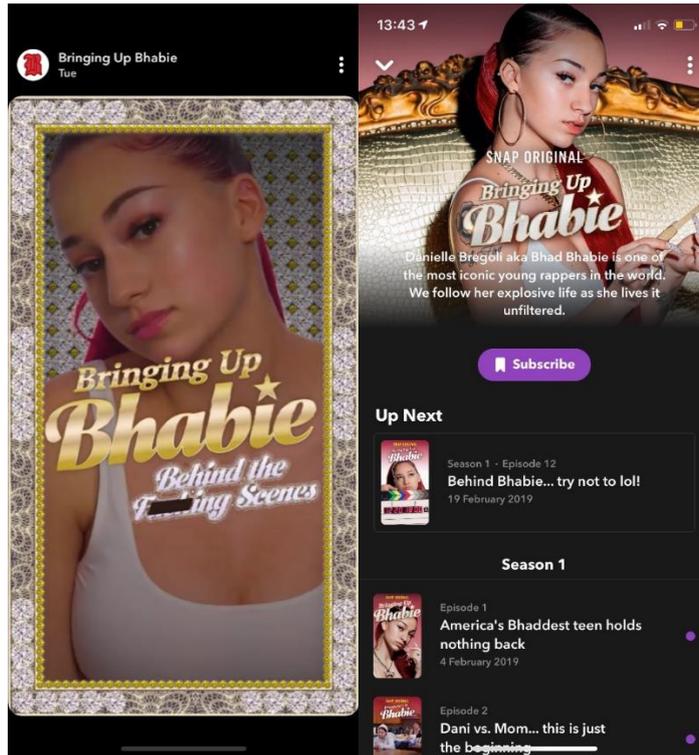
It is early days but creators, publisher and broadcast partners are trialling the formats and brokering revenue share deals. Facebook in particular is playing to its strength: the ability to create communities around the content.

With its sizable user bases, and desire to increase ad revenue share, Facebook, Instagram and Snapchat have all the key ingredients to make long form, broadcast video a success and revolutionise user behaviour.

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<sup>18</sup> <https://www.engadget.com/2019/02/22/snapchat-bhad-bhabie-nike-augmented-reality-identity-crisis/>

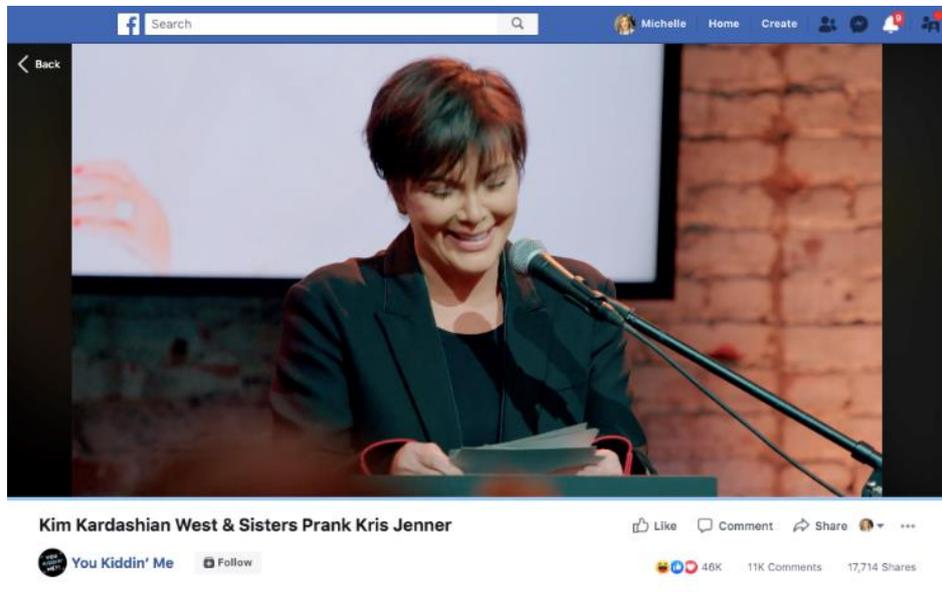
**Figure 6: Bringing up Bhabie, one of Snapchat's show successes**



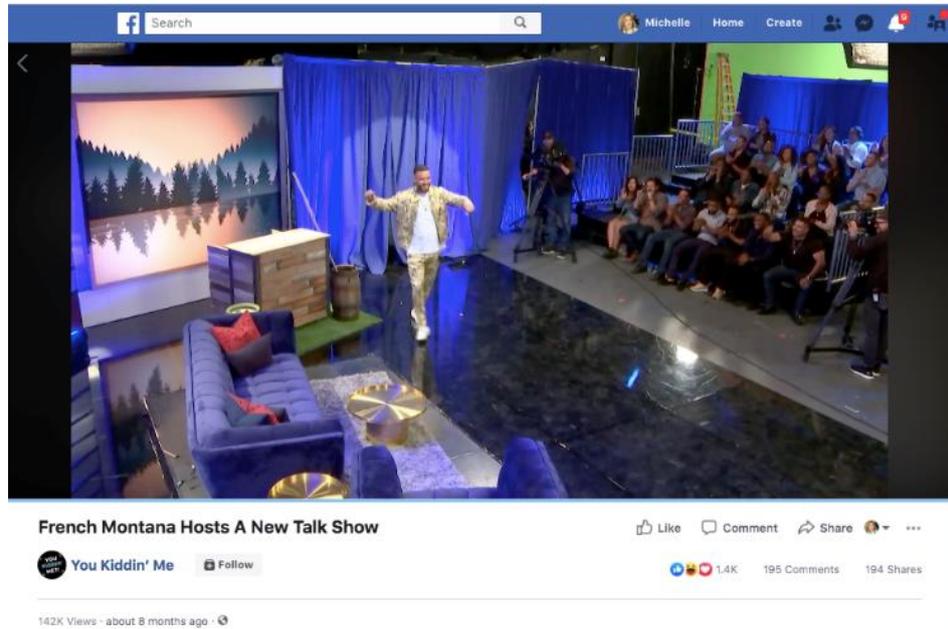
Source: Snapchat Originals – Bringing Up Bhabie<sup>19</sup>

One episode of Facebook Watch's celebrity prank series You Kiddin' Me, which features the Kardashians, has had more than 5.3 million views. Other episodes in the series have not commanded comparable figures (Figure 7).

**Figure 7: One episode of Facebook Watch's You Kiddin' Me has 5.3m+ views**



<sup>19</sup> [https://www.snapchat.com/discover/Bringing\\_Up\\_Bhabie/7006326799](https://www.snapchat.com/discover/Bringing_Up_Bhabie/7006326799)



Source: You Kiddin' Me Facebook Page<sup>20</sup>

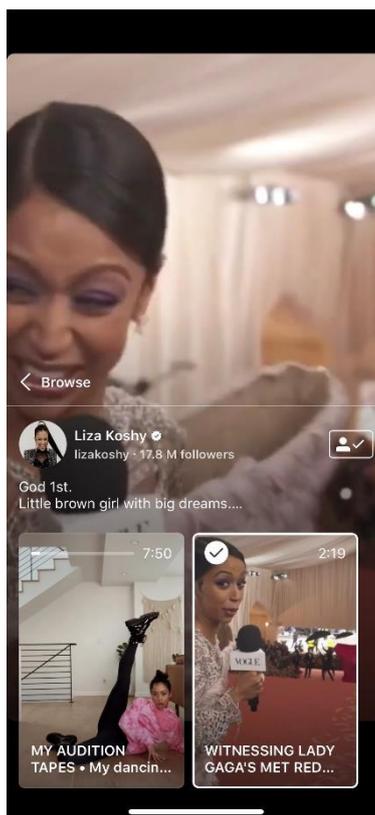
Some strategic implications for brands and organisations related to the changes in social content formats include:

- **Brand as broadcaster** – organisations that have not adapted their content strategy to include vertical video, have not invested in video and have not got their YouTube strategy right need to rocket fuel this.
- **User expectations are increasing** – any brand's content and videos are competing against established broadcasters and creators/influencers as well as brands who have mastered creative storytelling in longer form video formats. It is a quality field so be prepared.
- **More ad options in the platforms** – the main rationale for investment by platforms is to increase the inventory and quality of ad options. Consider how this affects the brand's advertising. Do not be tempted to recut and repurpose TV ads. Create platform- and user-specific ads and social content.
- **Premium creative collaborations with publishers and creators** – publishers, creators and influencers are establishing their presences and adapting to the platform. If early moves by the likes of Nike and Adidas' Instagram and the massive follower growth of YouTube creator accounts on IGTV are indicators, Instagram/IGTV is likely to be the platform where there will be more sponsored partnerships and premium ads through creators and influencers.

US-based creator Liza Koshy has 16.9 million subscribers on YouTube. Her IGTV account was launched in early May 2019. By June, it had 17.8 million followers.

<sup>20</sup> <https://www.facebook.com/pg/youkiddinme/>

**Figure 8: US creator Liza Koshy's highly successful IGTV account hit 17.8m followers in just one month**



Source: Liza Koshy on IGTV<sup>21</sup>

## 2.9 Rapidly evolving advertising

All of the major platforms have well-established, mass-adopted, easy-to-use self-serve advertising options and offer premium ad partnerships for brands.

The changes to social content formats (long-form video, stories, live video etc), retargeting, the ability to use first-party data and lookalike audiences provide advertisers with the opportunity to meet audiences and customers at all stages of the customer journey.

Traditionally, LinkedIn has lagged behind with less sophisticated self-serve advertising formats and targeting, but improvements have been made with its interest targeting, retargeting, Matched Audiences (first-party data) targeting options and lead generation ads.

Pinterest and Snapchat took their time to understand organic behaviour on the platform to ensure their advertising propositions worked for users and advertisers alike. Like the others, they offer remarketing and lookalike audience targeting on top of the expected demographic and behavioural targeting. Both have easy-to-use self-service platforms. Snapchat, mindful of the relative differences in its ad formats, has also created a simple-to-use ad creation platform, Snap Publisher.

Pinterest announced its IPO in 2019<sup>22</sup> and now has functionality in line with Facebook's product ad campaigns.

Pinterest's Catalogs feature allows brands to upload product feeds, organise their products by category, upload multiple product images and turn the images into dynamic Product Pin ads.

<sup>21</sup> <http://instagram.com/lizakoshy>

<sup>22</sup> <https://fashionunited.com/news/business/pinterest-ipo-priced-at-19-us-dollars-a-share/2019041827339>

Shopping Ads, where users can click on a post and ‘shop the look’ are also becoming slowly available to all via the self-serve Ads Manager interface.

The rise of social commerce formats and ads and the launch of Instagram’s checkout facility are likely to have an impact on how and where budget is spent by retailers and those who sell directly to customers online as well as those who have product to sell and are yet to commit fully to ecommerce.

Needless to say, there will be further chapters in the rapid evolution of social media advertising that will transform how marketers plan and manage their campaigns, but for now, there is a lot to pick through.

Econsultancy’s [Paid Social Media Advertising Best Practice Guide](#) provides an overview of the major social media channels and the most pressing considerations for marketers looking to generate the most value from social media advertising.

## 2.10 Content saturation and platform algorithms

Brands and businesses have become serious about their content strategies in recent times, but this has contributed to a situation that Mark Schaefer called Content Shock in 2014. He described it as *“the emerging marketing epoch defined when exponentially increasing volumes of content intersect our limited human capacity to consume it”*.<sup>23</sup> Quite simply, the supply of digital content has far outstripped our ability and time to consume, read, watch that content. For content and social media strategists this has big ramifications:

- Our content has to be better quality, more relevant, funnier, edgier, more informative, more emotional than that of our competitors.
- We will need to track what content types are successful in different channels and platforms
- We will have to pay to ensure that we reach significant audiences with our social content, whether they follow us or not.
- Our benchmarked KPIs, specifically on organic posts in social platforms, are going to have to be reviewed. We will need to look at reach, engagement, referral traffic and create meaningful benchmarks both from our own data and competitor/affinity brands and businesses.
- There will be a pattern of brands and businesses identifying hot topics and creating content before that topic becomes quickly saturated. First mover advantage is critical to visibility and shares.
- There will be a pattern of businesses doubling down on new social media content formats (e.g. stickers, long-form video, live video on LinkedIn) to gain attention. Again, these content formats will rapidly lose their impact as they become more common.

A study by the social research and monitoring tool specialists Buzzsumo, called Content Trends 2018, found that social sharing has halved since 2015 but sites that have built a strong reputation for original, authoritative content maintained comparatively high levels of social media shares.<sup>24</sup>

The study also highlighted growth in content sharing on LinkedIn. Many publishers are seeing steady increases in content engagement on that platform and there is more sharing of partisan political or ‘tribal’ content.

One statistic that all marketers must be aware of is that median shares of a social media post fell from eight in 2015 to just four in 2018.

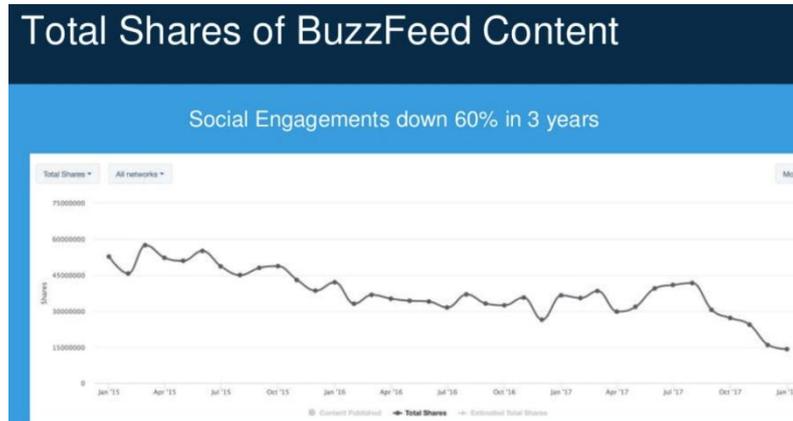
The data highlights the difficulty of gaining shares and engagement on social content. Any marketer monitoring their social platform’s organic post performance over the past two years will

<sup>23</sup> <https://www.businessesgrow.com/2014/01/06/content-shock/>

<sup>24</sup> <http://buzzsumo.com/blog/content-trends-2018/#qs.8L0DRac>

have seen how algorithm changes have affected their performance. Hopefully, they will have also taken steps to address the issue.

**Figure 9: BuzzFeed has seen fewer engagements and social content shares as a result of Facebook and Twitter’s algorithm changes and content saturation**



Source: BuzzSumo’s Content Trends Report 2018<sup>25</sup>

<sup>25</sup> <https://d380wq8lfryn3c.cloudfront.net/wp-content/uploads/2018/02/27130953/BuzzSumo-ContentTrends-2018.pdf>

# 3. A Broad Framework for a Social Media Strategy

If social media is to be part of a communications, marketing, customer experience/customer service, and increasingly an ecommerce strategy, then it makes sense for an organisation to approach social media strategy with organisational, brand, communications, servicing, digital and commercial aims, objectives and measures in mind.

Additionally, in order to build a successful social media strategy, the organisation must look inward and conduct research in order to collect data and intelligence about itself. This will allow it to determine the best ways of connecting and communicating with its audiences, customers or stakeholders. Therefore, it is important to also consider the aims and objectives of teams or departments responsible for product or service development and innovation when developing a strategy.

Many organisations focus on social media to support marketing and communications objectives and plan social media activity based on these. This is no longer enough. Regardless of where the business is on its journey, where social media sits and which organisational goals it supports, it is imperative to create a broad planning approach for its social media activity.

A useful planning framework for this is the Econsultancy PROSPER framework, which is outlined below (*Figure 10*).

- **P = Prepare**

The question we are answering: where are we now, and what do we need in order to succeed?

- What assets do we have access to?
- What is the competitive context?
- Who are the key stakeholders?
- What capabilities do we have and need? What tools might we make use of?

- **R = Research**

The question we are answering: what are the key insights providing the foundation for our campaign?

- Who are our key audience segments/personas?
- What do we know about them, and how can this help our planning?
- What is our brand position/tone/point of view?

- **O = Objective**

The question we are answering: where do we want to get to?

- What are our key (SMART) objectives?
- How will we measure success?
- Are our KPIs aligned to our objectives?

Figure 10: The Econsultancy PROSPER framework



Source: Econsultancy<sup>26</sup>

- **S = Strategy**

The question we are answering: how do we get there?

- How does our end point relate to our start point?
- What channels are we selecting to achieve our objective?
- How will we ensure that our activities are integrated?

<sup>26</sup> <https://econsultancy.com/how-to-plan-your-digital-strategy-with-the-prosper-framework/>

- **P = Plan**

The question we are answering: what are the specific steps we will take?

- What is the sequence of events that we are proposing?
- How will we utilise the channels we have selected?

- **E = Execution**

The question we are answering: what are the key actions that we are taking?

- Who is responsible/accountable/consulted/informed?
- How might we work with external agencies?
- How can we optimise performance?

- **R = Review**

The question we are answering: how did we perform, and can we do better?

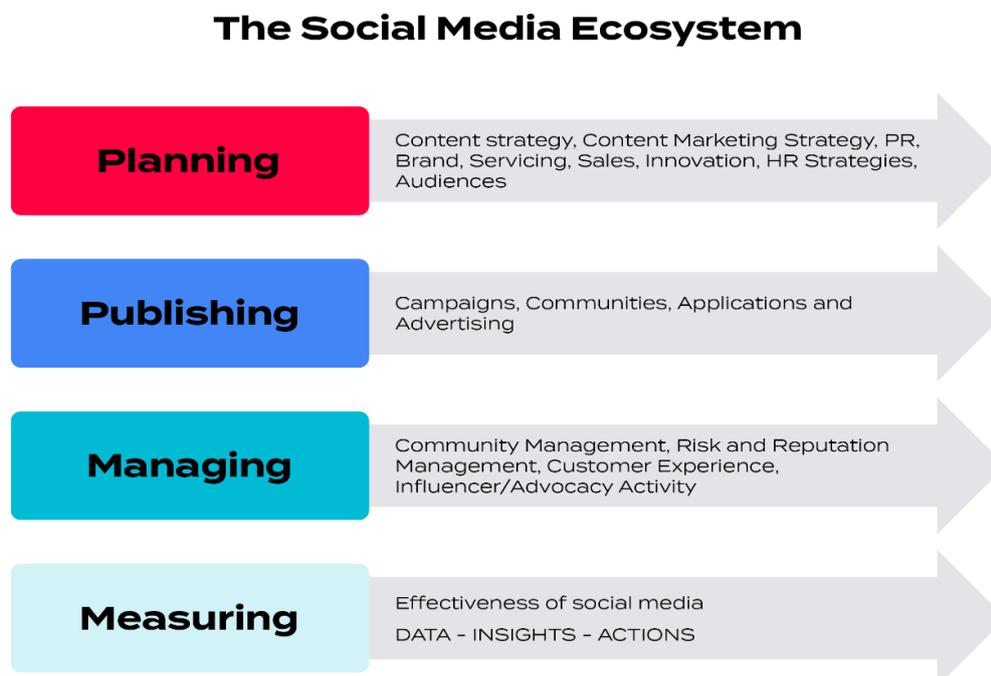
- How will we know when we have achieved our objective?
- What did we learn? What is the key insight?
- How can we apply and share that learning?

The benefits of using a planning framework such as PROSPER are as follows:

1. It ties the planning and implementation of your activity and approach back to the review elements.
2. It is a cyclical process – PROSPER should support continuous improvement in a fast-evolving environment.

Building out a ‘social media ecosystem’, like the model below, is a helpful way of thinking about who needs to be involved and what the inputs are for a planning framework like PROSPER.

**Figure 11: A useful model for considering the Social Media Ecosystem, team and department interdependencies**



Source: Michelle Goodall

For illustration purposes, in the planning phase, marketers will need the HR team's input, objectives, budget/resource considerations and their strategy – these are possible inputs.

Possible outputs are:

- Social media advertising and organic posts from the organisation's social media community platforms including HR 'employer brand', CSR campaigns and job vacancies.
- Managing queries, enquiries and comments on those employer brand and CSR campaigns in the organisation's social platforms.
- Measuring the effectiveness of HR campaigns, the quality of candidates, cost savings using social media as a key recruitment platform.

Finally, planning social media activity should mirror any strategic element of the business. Many organisations use existing marketing and communications planning processes to develop their social media strategy and campaigns.

It is recommended that organisations use/adapt the PROSPER general planning framework to include social media or use a similar planning framework.

## How do you develop your social media strategy?

“Our social strategy sits in the middle of everything we do.

“It's informed by our content, our messaging and ultimately our bottom line. Social has the potential to be the most personal interaction a prospect has until they enter the lower levels of the sales funnel.

“Social amplifies our announcements and campaigns, but can also allow us to show some personality. This is why social is so important: it's the most versatile aspect of marketing departments. It needs to ultimately be driven by strategy, but it can't be overly smothered and restrained. You have to allow your social media managers and teams the opportunity to make mistakes.

“Trying new tactics and ideas is also important when it comes to being reactive. Allowing social media managers to use their judgement leads to content and posts about conversational trends.

“Consider what people want out of social (and how this differs by platform). Twitter, for many people, is fun and creative and that's how we need to approach it. Endless reposts of owned content can only go so far, while in comparison, it works much better for LinkedIn.

“At the end of it all is tracking. Look at what content performs well, and split this out by owned, organic and curated posts. This heavily informs future content and social strategy, and gives insight into what followers actually care about. The latter being the most important thing when it comes to social.”

— Will McInnes, CMO, Brandwatch

# 4. Challenges and Opportunities in Social Media

The interviewees for this report were at pains to emphasise that there is no 'one-size-fits-all' approach to structuring and resourcing for social media. When they discuss social media with their peers, they see different pain points and challenges. Different industries are affected differently by their audiences', customers' or stakeholders' use of social media.

Social media is regarded differently from company-to-company and, more broadly, sector-to-sector.

For example, in some government organisations, allowing the user to self serve through social media channels is an imperative to save the tax payer money, and using social media to listen and engage (on top of traditional research and policy engagement methods) in order to help shape public policy as well as communications and public engagement campaigns is important.

In the publishing and broadcasting sectors, social has become an essential part of a migration of audiences' channels of consumption to mobile, VOD and social TV and therefore, reach, scale and monetisation are an important focus.

In retail, the rise of social commerce as a viable retail and sales channel is an area where many are focusing their attention, as well as the identification and selection of the right blend of partners, creators and influencers to reach audiences at scale.

Regardless of sector, social technologies, approaches and campaigns must be laddered back into business strategy and values, processes and practices with the aim of building relationships inside and outside the organisation, to create impact and value for the business and customer alike.

A social media strategy must be supported by clear strategic business goals and organisational alignment that enables execution of that strategy. There are many challenges and many different ways of resourcing and delivering against a social media strategy.

Businesses can reach their audiences, stakeholders, publics and customers in these environments in these ways through social media:

- a) **Community management:** creating a corporate presence on a social platform where businesses can post to followers and reply to comments.
- b) **Personal/professional social media presences:** where employees, at all levels, use their social media accounts to network, amplify corporate content and messaging and reach important audiences, stakeholders, publics and customers.
- c) **Social listening:** using tools to find people talking about relevant topics, competitors, the organisation and people elsewhere on the platform, then creating content, improving service or products and possibly engaging in a conversation with them.
- d) **Niche social communities:** creating a presence in, or working with, niche social (usually closed) platforms with limited users and forums around a specific topic. Businesses with complex products/services and a long sales cycle, those who rely on thought leadership and those where digital communication rarely takes place in a public network, are often the most active in these spaces.

- e) **Ad buys:** buying media space to serve ads to relevant users based on targeting characteristics. This has the most scale and tends to be the most efficiently priced.
- f) **Influencer activation:** using or borrowing influence from someone who is connected and influential. This can be staff or third-party influencers.
- g) **Messaging:** using messaging apps, the next frontier of 1:1 social interactions, which are taking place on more private channels like Facebook's WhatsApp and Messenger or WeChat.

As such, social media strategies and governance are rarely the sole responsibility of a single person or a marketing, digital, communications or customer servicing team. Many organisations have a central team but have devolved some areas of social media to specific teams, individuals or agencies/specialists.

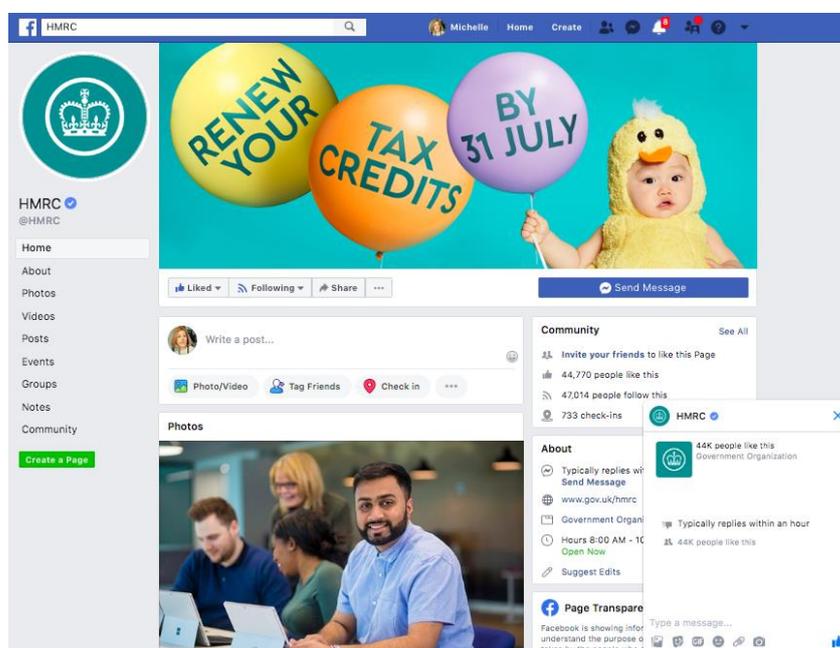
## 4.1 Integrating customer service and customer experience

An often overlooked area of integration is the importance of aligning customer enquiries and servicing into social media platforms. There are many examples of social customer service excellence in consumer sectors, particularly retail and insurance. Insurance company Direct Line Group is an exemplar in this area.

Direct Line Group has structured its social media listening and community management processes across businesses to include customer service, claims and other specialist teams, creating a best practice approach to social media management and customer experience through multiple social media platforms.

As part of its digital communications strategy, the UK's tax, payments and customs authority HM Revenues and Customs (HMRC) has effectively integrated its customer enquiries (consumer and businesses) with its core social media platforms, Facebook and Twitter (*Figure 12*).

**Figure 12: HMRC successfully manages business customer tax enquiries on Facebook and Twitter**



Source: HMRC's Facebook Page<sup>27</sup>

<sup>27</sup> <https://www.facebook.com/HMRC/>

HMRC is highly responsive on Facebook Messenger and Twitter. Business enquiries peak at specific times in the tax year and Messenger and direct messaging on Facebook and Twitter enable the team to handle seasonal spikes in tax queries.

Its Digital Customer Satisfaction<sup>28</sup> survey shows that 68.5% of surveyed customers were 'satisfied' or 'very satisfied' with the service on Facebook and Twitter.

Logistics and supply chain management company UPS has a mature approach to social customer service and has fully integrated social platforms, including Facebook Messenger, with its customer centre.

Ingrid van der Zalm, Director of Small Business Marketing and Communications in the company's Europe region, explains: *"All of our Facebook and Twitter accounts are connected to our call centre and any issues/complaints are directly responded by UPS customer service reps. Our main aim is to take the conversation offline and resolve the issue directly with the customer/consignee."*

## 4.2 Global, regional, local

Choosing between managing a centralised global presence or a diverse set of local presences in social media requires thinking across all other areas of marketing and communications. Broadly, global brands can create a global, local or blended ('glocal') approach:

- **Global:** a brand's messaging comes from one centralised team and is consistent across every market globally. Messaging may be translated into local languages but the content does not change.
- **Local:** a brand's communications are created or customised by teams based in that country.
- **Global-local (or glocal):** a brand's messaging is governed by a centralised team for brand/visual consistency across every market globally, and is placed in a social media asset hub. However, messaging may be translated into local languages and region-specific content can be created and posted.

### What are the challenges for brands with a global presence and reach?

"Consistency in the wake of different cultures. Marketers are taught to keep their messaging and narrative consistent. They are taught to repeat these practices until they are drilled into consumers' heads and become synonymous with the brand. This becomes much more difficult when your potential consumers live all around the world. Cultural norms vary, direct translations may not exist and the culture of business itself may be different depending on where you are in the world.

"In a perfect world, your company would have marketers on the ground in all the regions you hope to conduct business in. These unknowing (or knowing) experts of their own culture will keep you honest, and ensure that you're not putting your foot in your mouth whenever you figuratively open it. However, this is often not possible. In this case using a solution that brings the voice of the consumer into your decision making process is extremely important. Ultimately, you have to understand your customer as intimately as you can, and when opinions vary as much as they do in 2019, you should be considering your consumers' voice at home as well."

— Will McInnes, Chief Marketing Officer, Brandwatch

<sup>28</sup>

[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/627610/HMRC\\_s\\_Customer\\_Service\\_-\\_How\\_HMRC\\_reports\\_on\\_digital\\_customer\\_satisfaction\\_post\\_and\\_telephony.pdf/](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/627610/HMRC_s_Customer_Service_-_How_HMRC_reports_on_digital_customer_satisfaction_post_and_telephony.pdf/)

## What are the challenges for brands with a global presence and reach?

“For us, fundamentally a desire for local social. While we can share assets and stories, the importance of local language and a local voice. The challenges, as a global business, are around quick localisation of international assets and how to create global stories but be effectively local.”

— Kerry Taylor, VP, MTV International, Chief Marketing Officer, Viacom UK at Viacom International Media Networks

### 4.3 Pros and cons

Local strategies have the benefit of being fitting to cultural and language norms, such as colloquialisms and slang.

However, if brands are perceived as being American or British rather than global, think again before using the target countries' linguistic quirks. For example, US brands using terms such as 'gutted', 'dodgy', 'banter' or 'full Monty' in their UK social media content would not ring true. Conversely, UK brands using 'tight' or 'hella' in the US would sound odd.

The same phrase might mean entirely different things in different territories, even in the US and UK. For example, in UK English to 'table' something in discussions means to propose it. But to Americans, 'tabling' means to temporarily cease further discussion about it.

Maintaining local social media presences is costly and requires resource, quality assurance, governance and management (potentially through social media tools that allow for multiple users and languages).

A global social media strategy cannot simply rely on an organisation developing translated content and messages for its social media channels. Social media demands a strategy for engagement and issues/reputation monitoring. Issues and opportunities can arise around localisation of strategy and messaging. A challenge is that the brand needs a set of eyes, ears and a voice in local markets that understands the language, nuances and culture in each region.

One of the major benefits of having a local or 'glocal' social media strategy is that in-country teams can act as filters so that global brands can avoid embarrassing gaffes on social media, as well as spotting unique opportunities to connect with their local audiences.

Delta Airlines made a visual mistake below in a tweet in 2014 while congratulating the US soccer team for their 2-1 win over Ghana.<sup>29</sup> The used symbolic images from each country in their tweet. However, Ghana has no giraffes in the wild. Delta was pilloried for poor fact checking, especially as it provides flights to Ghana. This could be considered a relatively minor communications gaffe, but as a global operator, it was called out very publicly.

<sup>29</sup> <https://www.theatlantic.com/entertainment/archive/2014/06/delta-tweeted-a-giraffe-picture-because-americans-dont-know-anything-about-ghana/372917/>

### Figure 13: Delta Airlines' Twitter mistake



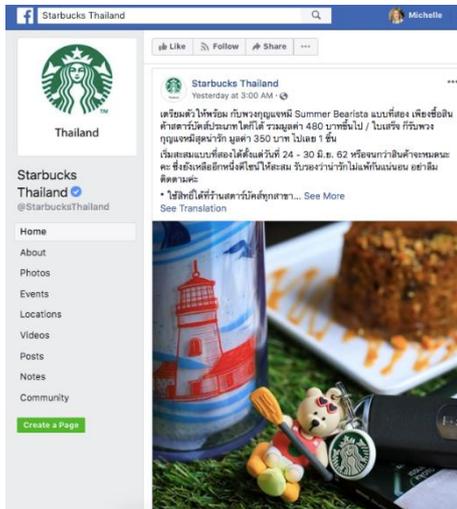
Source: Twitter

Starbucks' glocal social media content strategy ensures that core brand values, assets and quality are maintained, but local social media teams are able to create header content to promote regional favourite drinks, craft messages specifically for their audiences, managing reputational or product/servicing issues effectively.

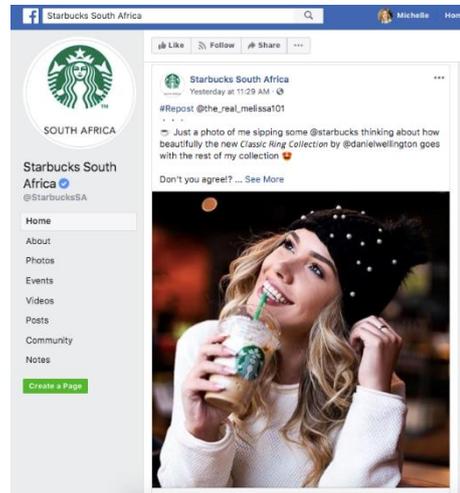
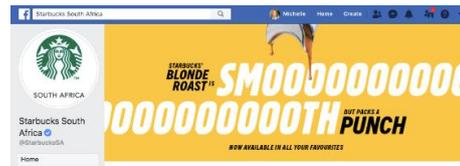
Here are four Starbucks Facebook Pages, managed at country level. It perfectly highlights the benefits of a glocal approach without affecting core brand values and messaging.

## Figure 14: Starbucks regional Facebook Pages

Starbucks Thailand highlighting a bear key chain sales promotion



Starbucks South Africa reposting a creator/influencer partnership Instagram post



Starbucks Hong Kong promoting its merchandise collection



Starbucks UK promoting its Born This Way Foundation and support of Pride



Source: Starbucks Thailand,<sup>30</sup> South Africa,<sup>31</sup> Hong Kong,<sup>32</sup> UK<sup>33</sup> Facebook Pages

<sup>30</sup> <https://www.facebook.com/StarbucksThailand/>

<sup>31</sup> <https://www.facebook.com/StarbucksSA/>

<sup>32</sup> <https://www.facebook.com/StarbucksHongKong/>

<sup>33</sup> <https://www.facebook.com/starbucksuk/>

For agencies managing a global and local social media strategy, it is helpful to have a visual reminder of the organisation’s summarised approach for clients and team members, such as the one below to ensure clarity on roles and areas of responsibility. This must also be supported with detailed and agreed approaches to ensure brand and message consistency within an agreed framework.

**Figure 15: Global and local social media strategy framework**



Source: H&K Strategies

## What are your approaches with clients with a global/local social media strategy?

“Global and local content will always be a nightmare to handle due to time differences, language barriers, company politics, product availability etc. and there’s no quick solution.

“In short, global should own brand guidelines, hero launches and brand campaigns, local should own local launches, customer engagement and most importantly, customer services.

“Here are some key ways to simplify processes and define the responsibilities of global/local markets to keep the brand message and style consistent across all platforms:

- **Brand guidelines:** Global should set out visual identities, tone of voice, templates and social content lockups for local markets. These can be presented to local markets in a toolkit and will help ensure that wherever in the world you’re viewing content from it looks the same
- **Launches:** Key messages and hero product launches should lead from global channels, local markets should share from global channels hero launches and activate their own local market launches
- **Customer service:** Local channels should own customer service and pricing – product availability and price varies from market to market, global should only ever redirect to local market channels
- **Paid media:** Global and local markets should have their own paid media strategies
- **Use a content management system:** Cascad[e] content as packages to market with suggested content calendars for them to optimise in their local languages.”

— Helen Wood – Head of Content + Publishing, H+K Strategies UK

## 4.4 Reputation and risk management

Social media has had a huge impact on brand and organisational communications and has led to a total transformation of the speed and processes required to respond to issues and crises. Gone are the days when organisations could spend hours accessing and evaluating the facts before establishing a response.

Not every organisation will have to deal with serious issues or a crisis, but every organisation will encounter reputational issues with differing degrees of seriousness and impact.

The challenge for organisations is preparing for every eventuality; from the irksome (e.g. a troll spamming your social feeds with negative comments), the concerning (e.g. a vocal complaint about an employee's conduct on social media), the bad (e.g. a breach of confidence as a sales employee tweets a location-based tweet from a client's offices), to the worst (e.g. an employee caught on video racially abusing or harassing a member of the public).

Establishing effective procedures to prepare and rehearse for crisis and issues scenarios are standard practice in organisations worldwide.

In every crisis and issues situation there is a four-stage process:

1. Identification
2. Evaluation
3. Escalation
4. Response

These areas are explored in brief below.

### 1. Identification

Most consumer-facing organisations find about issues and crises through social media before they find out about them from their own employees and associates. Establishing an effective social media listening process with social media monitoring tools is the first step any organisation should take to help with crisis and issues communications.

Regardless of how small the business is, someone should be responsible for checking all online media and social media channels on a daily basis at the very least.

Consider things that are sources of potential complaints and that could happen to the organisation. What are the most likely events that would cause an issue or crisis? Start with the scenarios that would stop the organisation's ability to function (crises), then move on to less serious challenges (issues).

Consider words or phrases that consumers, campaigners or critics might use when associating the organisation with these issues or crises. Establish keywords or keyphrase searches, which relate to how those issues would be described through social media. These keywords should be used to highlight potential issues on a regular basis through monitoring tools.

For example, an airline may use hundreds of keywords and keyphrases to track conversations, including:

- terrible OR dreadful OR woeful OR unacceptable OR substandard +airline name
- threat +airline name
- death OR die OR killed +airline name
- strike +airline name

## 2. Evaluation

Most organisations establish some form of triage. This means that when issues are identified, they are assessed and prioritised, so that whoever discovers the comments knows who in the organisation needs to be made aware of it and who needs to act upon the information.

How the seriousness of an issue on social media is evaluated may include:

- What is being said: the seriousness of the issue.
- Who is saying it: the influence or authority of the person who posts it.
- How often is it being said: whether the issue is becoming increasingly visible or ebbing away.

Many organisations create a simple scoring or traffic light system for issues to help categorise the importance and speed with which they need to be handled.

Large organisations and those who take issues and crisis management seriously will use social media monitoring software to monitor their keywords and phrases. Monitoring software can speed up the evaluation phase by providing data on influence and volume as well as automatically categorising posts and issues depending on keywords, location and according to sentiment.

During London 2012, the social media monitoring team were examining, evaluating and triaging millions of tweets every day. They broadly categorised tweets into two groups: those that came from the venues themselves related to experiences of the events (to inform customer experience/rapidly highlight venue issues or positive reactions) and those from observers, TV viewers, journalists/influencers and commentators. Peaking of issues and velocity of tweets had to be evaluated on a minute-by-minute basis, in the context of the sheer daily volume of social media mentions.

## 3. Escalation

Social media monitoring can help spot potential issues and evaluate them, but another critical element of crisis and issues management is deciding exactly who needs to know what is happening and how quickly they need to know.

This is called an escalation process and organisations structure these very differently.

For example, if an organisation uses a 1-10 evaluation system, level 1-3 issues could be handled by the customer service teams, product development teams or sales departments. PR or communications teams would normally expect to be alerted immediately to any level 4-10 issues, and the CEO and executive board would be made aware of any level 8-10 issues (crises).

A crisis team will typically comprise senior PR and communications, customer service, HR, legal, operations, technical, product or marketing experts. Depending on the issue, additional people that are best placed to monitor and respond will also be included (e.g. technical or IT experts for data or security breaches, business continuity for physical threats, etc.).

The crisis team will remain mobilised until the crisis calms down.

## 4. Response

As a part of identifying the possible issues and crises, an organisation will have created pre-approved responses to specific comments in social media.

A good social media team will be constantly evaluating the effectiveness of their responses and considering new keywords and keyphrases to monitor. They will also be prepared to rapidly evaluate and escalate issues that have not been scenario planned.

Take for example this issue from Marriott, which suffered a PR backlash when a genuine attempt at a good deed went badly wrong (*Figure 16*).

On September 11, 2013, a staff member at San Diego Marriott Mission Valley Hotel decided to offer complimentary refreshments to their guests in honour of those who lost their lives in 9/11.

A hotel guest tweeted an image of the poster questioning the 'promotion'. The tweet was rapidly shared on social media, with many people accusing the hotel of misunderstanding the mood of the nation. It was picked up by global news media, having an impact on Marriott's reputation way beyond San Diego. Marriott issued a response:

*"We are aware of the picture that was tweeted. It shows an offer that was made independently by the hotel and not the Marriott Hotels brand. As far as we know, it was limited to one property.*

*"While the hotel was making a sympathetic gesture to its guests in remembrance of 9/11, we apologise and understand why some people may have misunderstood the intent of the offer. We are reminding our hotels to use discretion and be sensitive when remembering major events such as 9/11."*

**Figure 16: A well-meaning staff member causes a social media backlash**



Source: Twitter<sup>34</sup>

This example illustrates that a crisis can appear from nowhere and how important it is to identify potential crises quickly. When issues are escalated and the crisis team is convened, as it will have been in Marriott's case, the team will need to decide whether it should respond and if it needs to change anything as a result of what has happened.

It is a brave strategy to sit tight and say or do nothing when there is a significant spike in online criticism, but this can sometimes be the best approach. Some issues calm down of their own accord very quickly. In other cases, the organisation may simply need to take the criticism.

If the crisis team decides that a statement is required, either on social or traditional media, the content, tone and wording are critical. This is why most responses are drafted by PR or communications teams.

<sup>34</sup> <https://twitter.com/DAsulin/status/377844030786117632>

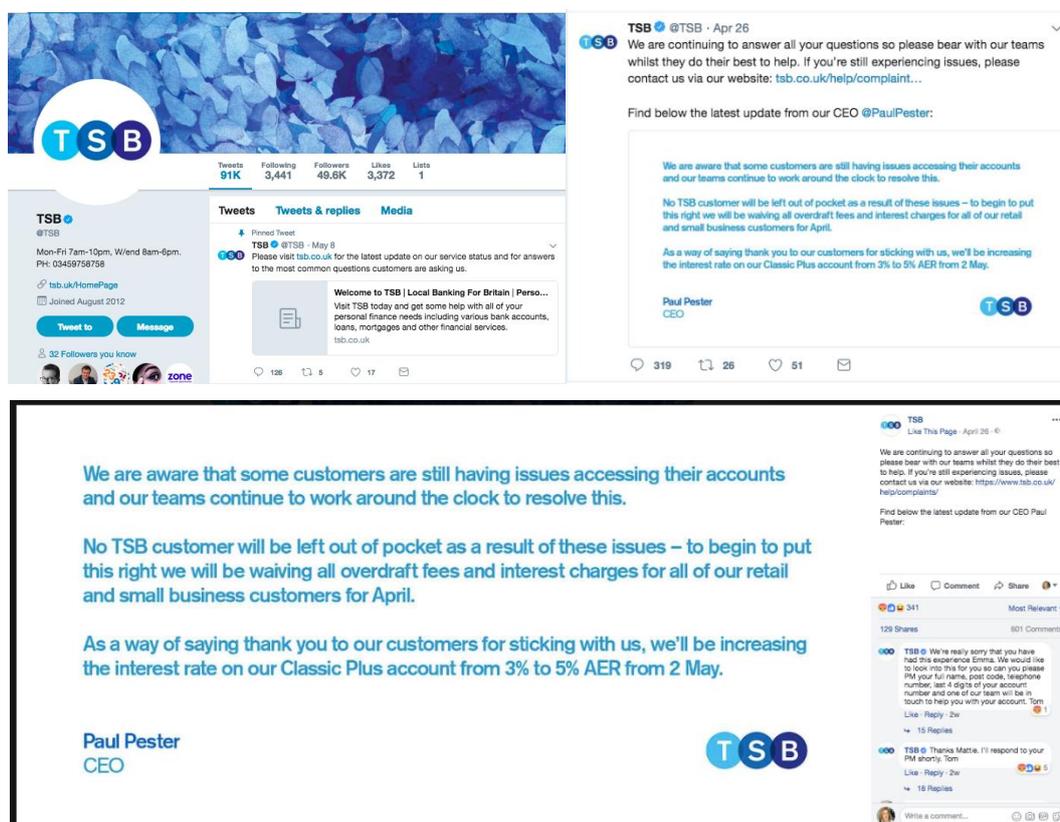
The best statements consider:

1. The facts and the severity of the crisis
2. The mood of the audience
3. The channel(s) on which the statement will be used.

Every situation is unique, but here are some considerations for distribution of response statements:

- Ensure that the team has agreed how the business will respond to comments and who will respond to comments before posting
- Twitter is effective for rapid response, either for linking to long-form statements on other channels, for publishing a statement as an image or a thread of tweets, or simply for demonstrating that an organisation is aware of the issue and will respond once it has investigated the facts. Many news media will embed tweets in their articles.
- Organisations' own websites, media centres and blogs are the most 'formal' place for a response, particularly if the crisis will play out over several days.
- YouTube and native video on Twitter, LinkedIn and Facebook are possible options to give CEOs or spokespeople in the organisation an opportunity to respond directly and at speed. Posts containing video may also get embedded on websites/news channels, providing more context than a text-based statement.
- Facebook posts can be suitable places for longer form responses, which can be linked to/from pages elsewhere. Again, news media can embed Facebook posts in their articles.

**Figure 17: UK bank TSB communicates with its customers throughout an IT crisis using a combination of social media platforms**



Source: TSB's Twitter<sup>35</sup> and Facebook<sup>36</sup>

<sup>35</sup> <https://twitter.com/TSB>

<sup>36</sup> <https://www.facebook.com/TSBbankUK/>

## Have you ever had to handle a crisis or significant issue in social media? What did you learn? What would you advise others to do?

“We launched an outdoor advertising campaign across London which, unintentionally, caused offence to some of our vegetarian and vegan audience.

“We had a significant backlash to the campaign and many took to our social media channels to air their views. As the most instant and public channel to voice your views on a brand, we needed a watertight response plan but also needed to give people the chance to have their say.



“We worked very closely as a team to formulate a plan and a response. We avoided a knee-jerk defensive reaction and instead chose to ride the storm, let the comments come through and respond with an appropriate and genuine statement. We waited for the right time to re-engage rather than responding to every comment. That would have been impossible and may have just fuelled the fire.



“In the end, the customer response created a much more public debate around whether the campaign was offensive or purely a tongue-in-cheek message. The debate raged on and generated a huge amount of awareness for the brand through social, digital and national press coverage.”

— Gourmet Burger Kitchen

## Have you ever had to handle a crisis or significant issue in social media? What did you learn? What would you advise others to do?

“A fictional video reporting the onset of thermonuclear war, that featured BBC News branding, caused public alarm in April 2018 when it was shared in social media.

“The YouTube video was a disaster scenario psychometric test by an Irish company for one of their clients. The video was over two years old, and was clearly a fictional dramatisation, but it was copied and shared in WhatsApp. People who shared it were not stating that it was a fictional scenario using an actor (and that it didn’t even look like a BBC News report) or checking news sources to verify the ‘story’.

“It eventually broke through to Twitter and other public social media spaces. When we were finally able to see the video and track public comments, we put out a statement.<sup>37</sup>



Source: Twitter / BBC News

“The challenge here is that we, and other brands/organisations, simply don’t have visibility of potentially harmful content when it is shared on private social networks before breaking out to public social platforms.”

— Mark Frankel, former Social Media Editor, BBC News

## 4.5 Emojis, visual social media listening and reputation management

The growth of mobile native, highly visual social platforms such as Instagram and Snapchat has transformed user generated content in social media.

<sup>37</sup> <http://www.bbc.co.uk/news/blogs-trending-43822718>

The social web is arguably much more beautiful than it was in the early 2000s, but the increased number of visual formats such as Instagram posts or Stories has also created challenges for marketers wishing to detect things such as:

- Unauthorised logo use
- Negative visual mentions or ‘brand vandalism’
- Positive fan ‘love’ for a product or brand.

Social media listening tools traditionally focused on artificial intelligence and semantic analysis, which enabled them to capture and analyse the context of *words*. Today, however, many social listening vendors and technology companies have created *visual* listening tools for social media, using powerful image recognition technology to capture and analyse the context of visuals such as the use of logos.

These tools provide marketers with improved understanding of how images, not just hashtags and keywords, relate to their brands – both positively and negatively. They also provide analysis of connected visual brand assets created and shared by consumers, highlighting which generate the most interest and engagement in social media.

AI technology, such as GumGum’s computer vision technology, can identify key aspects of a photo such as a logo or product, even when there is no accompanying caption or hashtag.

**Figure 18: Brand love, logo misuse and negative visual user mentions can be tracked with increasingly visual social media analysis tools**



Source: Instagram<sup>38</sup>

*“When, in some cases, over 80% of consumer social content about a brand is visual and you’re a marketer seeking to get the most, say for example, from a sports sponsorship, then missing valuable visual user generated social content to demonstrate ROI on that sponsorship is a massive issue,”* says GumGum’s Commercial Director, Pete Wallace.

Will McInnes, CMO for digital consumer intelligence company Brandwatch, continues: *“There may be instances where individuals, or other brands, are using your owned images or logo in a problematic or illegal way online. When this happens, logo detection and image analysis are invaluable. Being alerted to these posts allows you to react, and possibly get them removed or taken down.*

*“Social intelligence platforms have adopted image analytics and object identification. We often post images online with text too, so rather than seeing this as a ‘text OR pictures’ world, it’s often both together. If you’re using good technology, you’ll be in a position to manage your reputation covering both.”*

<sup>38</sup> <https://www.instagram.com/p/B0TRfyPA5GV/>

Marketers have had to learn a new visual language, as well as interpret and derive meaning from it. Emojis punctuate most social posts. Every July, there is an annual World Emoji Day when emojis are celebrated and new ones are launched.

Consumers (and marketers) have a rich palette and so many new visual characters to express ideas, thoughts and feelings.

**Figure 19: 2019's World Emoji Day saw Apple bringing more diversity to its emoji set**



Source: Tim Cook on Twitter<sup>39</sup>

Our personal interpretation and use of emojis, like slang or favoured words in verbal communication, is nuanced and deeply individual. For example, look at your most frequently used emojis and compare it to those of a younger or older colleague, family member or friend. There will be significant differences. Are you more positive, empathic, celebratory, sporting or cheeky than others?

Consumer love for emojis, combined with newer visual social media post formats, such as Instagram Stories with emoji sliders,<sup>40</sup> for example, means that social listening and social posting for brands and businesses continues to evolve and become ever more complex.

<sup>39</sup> [https://twitter.com/tim\\_cook/status/115162297977748992](https://twitter.com/tim_cook/status/115162297977748992)

<sup>40</sup> <https://instagram-press.com/blog/2018/05/10/introducing-the-emoji-slider/>

**Figure 20: Social post formats continue to evolve combining complex visual elements such as Instagram Stories ‘Emoji Sliders’**



*Source: Author's Instagram*

Fully automated social media listening and sentiment analysis is a long way off. Visual formats and emojis have perhaps made this an unattainable target. If humans use emojis in different ways, in different contexts, among different tribes or groups and use them ironically or even in a codified or sexualised ways, then arguably, human analysis of emoji-laden visual social content is more important than ever.

Will McInnes continues: *“All the tech in the world is no replacement for human analysis. One reason is the continuous evolution of language. Words that are traditionally thought of as being negative can mean the exact opposite when it comes to slang. This isn’t exclusive to written and spoken word, now, emojis have their traditional meaning and their slang meaning, too.*

*“Great insights are nuanced and subtle and humans are still – thankfully – the best at doing that. Machines for the heavy lifting and signposting, with humans for the stories and lateral dot-connecting.”*

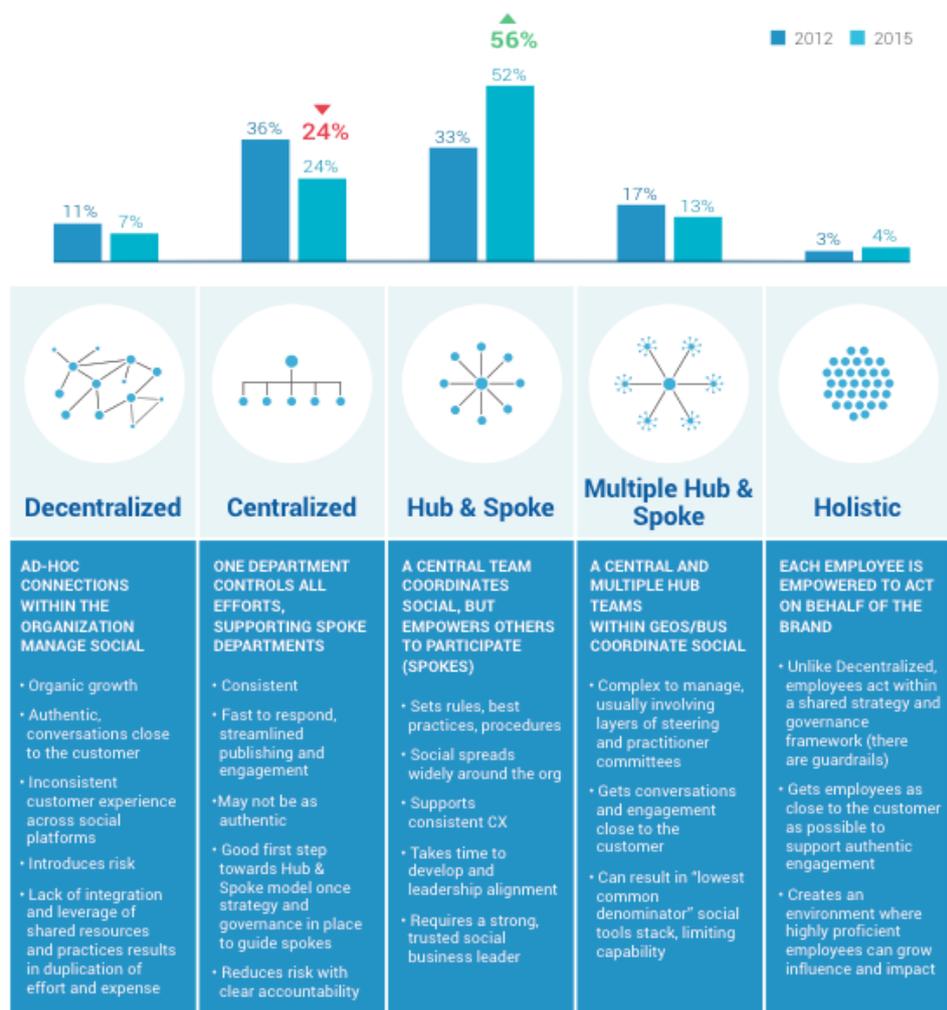
# 5. Organising for Social Media: Typical Operating Models

In 2013, Altimeter reviewed the operating models of 700 large organisations that were active in social media channels.<sup>41</sup> It found that the majority of these organisations had centralised their social media so that a single team (or individual) developed the social media strategy, chose channels, developed social media campaigns/content, provided governance and selected technologies. They had effectively created a centre of excellence and had chosen a centralised model.

**Figure 21: Models for social media teams**

**FIGURE 8 ORGANIZATIONS SHIFTED AWAY FROM CENTRALIZED TO HUB AND SPOKE MODELS FOR SOCIAL TEAMS**

Q: Which of the following best describes how social is organized?



2015 Source: Altimeter Group, Social Business Survey, 2015, Base: n=113 respondents with > 250 employees  
 2012 Source: Altimeter Group, Social Business Strategy Survey, Base: n=157, respondents with > 250 employees

Source: Altimeter<sup>42</sup>

<sup>41</sup> [http://altimetergroup.wpengine.netdna-cdn.com/wp-content/uploads/2013/03/Altimeter\\_Evolution\\_Social\\_Business\\_FINAL\\_030613.pdf](http://altimetergroup.wpengine.netdna-cdn.com/wp-content/uploads/2013/03/Altimeter_Evolution_Social_Business_FINAL_030613.pdf)

<sup>42</sup> <https://www.prophet.com/altimeter/>

In 2015, the study was conducted again. The findings were that over the previous two years, respondents had been trying to integrate social media more deeply within their organisations. In most there was a move towards a hub and spoke model, where a central team continued to coordinate social media, but empowered others in the organisation to participate.

Today, most large organisations use centralised or hub and spoke approach as their operation models for social media and content strategy. In most cases, regardless of the sector, there is still a central team responsible for the social media strategy, governance, quality control, measurement and policies.

Some have devolved further to a multiple hub and spoke model, ensuring that these satellite teams have a point person who is responsible for aligning to the central social media strategy, often working closely with the central team. Very few organisations have adopted the holistic model, where each employee is empowered to act on behalf of the brand.

An illustrative example of how the multiple hub and spoke operating model might work could be a global legal services organisation, where the multiple spokes might be specific legal practice areas, country or sectors (e.g. patent law, life sciences, EMEA). Those teams will be responsible for the creation of social media content, community management, business development and reputation management in their specific practice area, sector or region.

Most smaller organisations will naturally use the centralised or hub and spoke model with a full-time social media manager, small social team or someone in a communications or marketing role operating at the centre.

Buffer is an example of a medium-sized SaaS business that epitomises a loose hub structure for social media. It regularly blogs about its evolving approach to content marketing and social media.

## How do you structure for social media?

“What’s our structure at Buffer? We don’t have a social media team per se. However, if I were to refer to Sallie [Burnett]’s five ways above (*Figure 21*), I think a hub and spoke structure might best describe our social media effort here at Buffer (though we don’t exactly see it that way.)

“Within the ‘hub’ (i.e. our marketing team):

- Brian (Digital Marketing Strategist) creates new, engaging social media content and experiments with new social media features and products like Instagram Live and Snap’s Spectacles, among many other things.
- Ash Read and I (Content Crafters) write long-form articles on this blog.
- Arielle Tannenbaum (Community Champion) organises our weekly #bufferchat and, together with Bonnie Huggins (Loyalty Marketer), listens and engages our community on social media.

“Outside the ‘hub’, our Happiness Heroes (i.e. our customer support specialists) support our customers through Twitter and Facebook Messenger on a time zone basis. The rest of the team also jumps onto relevant social media conversations (e.g. an engineer replying to a technical question on Twitter).”

— From the original blog post *How to Structure an All-Star Social Media Team*<sup>43</sup>

Regardless of the size of the business and where social media sits, there will be challenges. The report interviewees summarised some of the current challenges that many organisations face:

1. Every new social media platform and every change to existing platforms will require a review of the operating model. The skills required in developing TV broadcast quality video for Snapchat,

<sup>43</sup> <https://blog.bufferapp.com/social-media-team>

Facebook Watch and IGTV and developing chatbot applications in Facebook Messenger or Twitter are very different to those required for managing a Twitter channel or building a Facebook community.

2. Consumer service expectations have dictated the operating hours and service level agreements in social media channels – most interviewees have a 24/7 ‘always on’ model.
3. Quality control and consistency in large/global organisations with hundreds of social media channels is a massive undertaking.
4. Being agile and responding quickly to communications and new data targeting opportunities is difficult for large organisations in heavily compliant sectors such as finance and pharmaceuticals.
5. Agency support is critical for providing smart ideas and additional resource when required, but many of the community management, servicing and communications elements of social media have slowly moved in house.
6. Planning processes takes time; it needs to include many stakeholders, teams and departments but a single view on social media communications and content is critical.

## 5.1 Operating hours

The hours that the business chooses to interact on social media will be dependent on many factors, including (but not limited to):

- The hours it can safely and compliantly resource social media channels
- Which departments social media supports
- Whether the organisation is a global brand
- The hours when its customers need support.

The following examples illustrate how operating hours reflect organisational factors:

- A UK charity unpublishes its Facebook Page outside office hours to ensure that anyone concerned about a vulnerable child or facing abuse uses the telephone to contact them directly, 24/7. This ensures that a potentially lifesaving message is not lost on social media channels overnight or at weekends.
- MTV’s operating hours on social media are 24/7. It has peak moments on social media where popular shows are broadcasted that create spikes in brand and audience engagement.
- The UK government’s Department for International Development (DFID) monitors social media 24/7 for rapid response scenarios such as natural disasters, but its content publishing hours are somewhat shorter.
- The UK’s largest retail insurer, Direct Line Group, has a social service team providing customer service and support through social media channels from 8.00am to 9.00pm Monday to Friday, between 9.00am and 5.00pm on Saturdays and between 10.00am and 5.00pm on Sundays to reflect the times when customers most need help.

*Figure 22* shows some examples of Twitter accounts with different operating hours, which all provide a clear indication of when they are online in their biographies. For those who run out of characters in their bio, the header photo can also contain this information.

## What are your operating hours on social media?

“We have a 24/7 social media team managing customer enquiries. This team works closely with my team on responding to any situations impacting customers as a group or for any fun/banter communications. For issue management, my team operate an on-call rota.”

— Communications VP, Consumer brand

“Monday to Friday, 9.00am to 5.00pm, which is published on most of our channels. Auto-responses are set up for Facebook. We have an ‘out-of-hours’ rota in operation, monitoring accounts and social listening alerts. Digital and press teams work together if anything concerning crops up out of hours.”

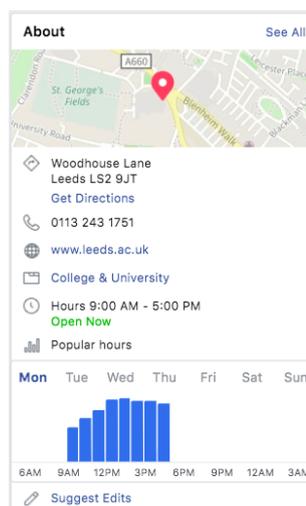
— Martin Carter, Social Media Manager, University of Leeds

Figure 22: Examples of opening hours for Twitter accounts



Source: Twitter

Figure 23: Facebook Page Managers can set opening hours for certain page types



Source: University of Leeds' Facebook Page<sup>44</sup>

<sup>44</sup> <https://www.facebook.com/universityofleeds/>

## 5.2 Resourcing for social media

A social media team of one can manage social channels, provide servicing, support and create brilliant content and engagement, delivering better results than a social media team of six with agency support. Social media can also successfully be absorbed organically into organisations without the need for a social media team or strict governance.

It was widely acknowledged among the interviewees that as platforms evolve, as social media moves beyond the domain of brand marketing/communications and further into research, customer experience and ecommerce, mid- to large-sized organisations need to rethink their structures. As such, developing new roles and skills, reorganising and integrating teams, and re-establishing the support roles of agencies has been something that many organisations are working through.

Social media production specialists and social media editor roles have become more popular. There is a developing understanding that audience-first, channel-specific content is critical to a successful approach.

As this report has touched on previously, how organisations resource for social media will be wholly dependent upon their size, operating model, which department's objectives support social media activity and how much social media is valued within the organisation.

For small organisations, the reality is that social media planning, management, implementation and measurement are often an extension of those who have a marketing or PR role. Social media can also be successfully absorbed organically into large organisations without the need for a separate central global social media team.

To help marketers with their social media strategy, regardless of their organisation's size, the key areas of social media responsibilities to typical marketing, communications, digital and sales roles have been summarised in the table below.

**Table 2: Typical social media specialist roles/responsibilities**

Social media specialist roles	Typical matched communications/PR, digital, sales and business development roles	Summary of typical responsibilities
Head of Social Media	Head of Marketing, Head of Digital, Head of Communications/PR, Senior Digital Strategist, Marketing Director	Leads (often global) social media strategy development to drive brand and commercial performance. Defines future direction of social media presence. Builds business cases for the future blend of paid, owned and earned social activities. Owns internal best practice and works across teams and business units.
Social Media Manager	Marketing Manager, Comms/PR Manager, Content Marketing Manager, PR/Media Relations Manager	Develops and executes the social media strategy (paid, owned and earned) and optimises the overall social media presence of the business. Possibly manages a team of community managers, social content producers and works with agencies
Head of Paid Social	Head of PPC, Head of Performance Marketing, Biddable Media Specialist, Paid Marketing Manager	Leads overall paid social function including overall strategy, goals and forecasts, setting the budget spend priorities, and measuring overall results against plan. Possibly working with agency or may plan and execute campaigns with an in-house team.
Head of Social Customer Service	Head of Customer Service	Defines and implements strategy, standards and procedures for ensuring optimal customer experience and servicing in social media platforms, including automation of servicing.

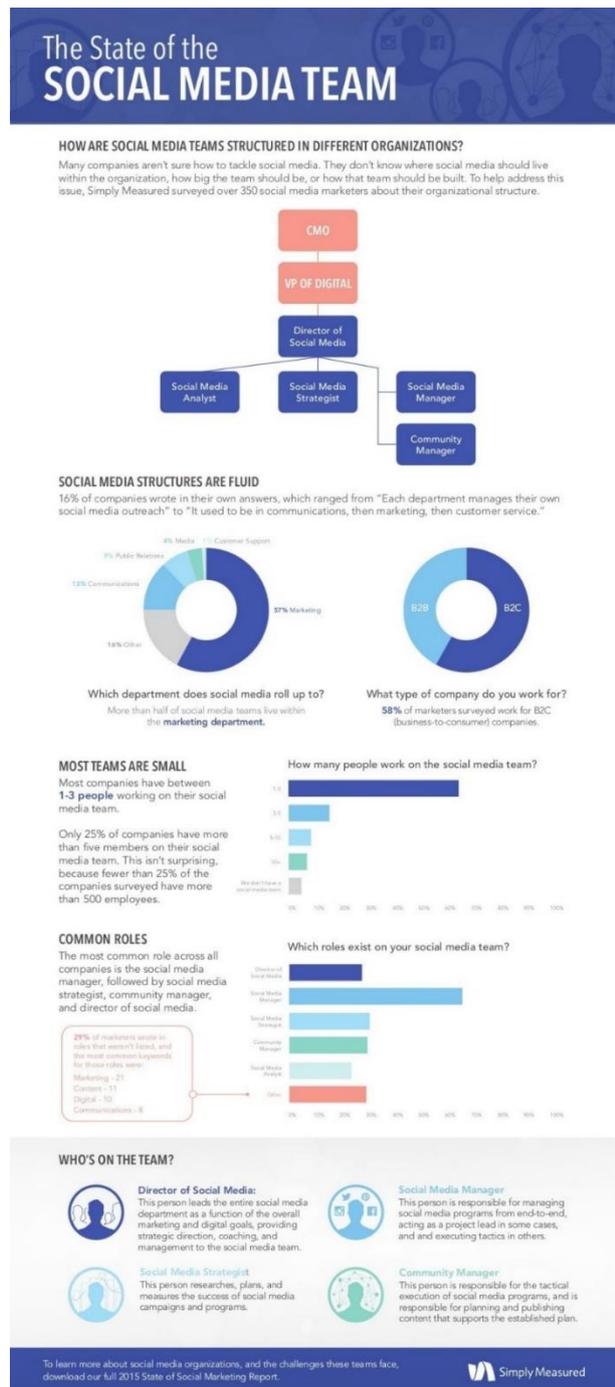
Social media specialist roles	Typical matched communications/PR, digital, sales and business development roles	Summary of typical responsibilities
Head of Social Content/Social Media Editor	Hybrid Content Marketer, Digital Content Manager	Creates or manages creation of social-specific content for all social media platforms. Oversees social content production process from inception to delivery, often creating content from scratch, working alongside other teams and creatives in order to leverage their work for social use.
Social Media Community Manager	PR Manager, Senior PR Executive, Community Manager	The voice of a brand in social media platforms growing, engaging with and reporting on an active online community. Working alongside the social media manager and the marketing, content, CRM and customer service teams, they cultivate social communities to drive customer loyalty and retention, as well as help to grow brand awareness and new customer acquisition.
Social Media Service Agent	Customer Service Agent	Responsible for customers' experience through handling enquiries and customer service issues effectively in social media. Can be specialists, but often agents operate in a range of channels such as telephone, post, email as well as social media.
Social Media Content Executive	Content Producer, Graphic Designer, Junior Web Developer/Video Designer, Junior Marketing Executive or Co-Ordinator	Creates social-specific content for all social media platforms. Often working alongside the social media manager, head of social content or other teams and creatives in order to adapt their work for social use.
Social Media Content Executive	Digital Data Analyst	Organises and analyses social media data. Creates meaningful reports that can drive better decisions and performance.

Source: Michelle Goodall

Research by Simply Measured found that the most common social media role across all companies is Social Media Manager and that more than half (57%) of social media teams are contained within the marketing department.<sup>45</sup>

<sup>45</sup> <https://sproutsocial.com/insights/infographics/state-of-social-team/>

**Figure 24: How are social media teams structured in different organisations?**



Source: Simply Measured<sup>46</sup>

### 5.3 Insourcing and outsourcing

The interviewees for this report all spoke of the changing role for agencies. In the early days of social media, agencies provided the creative strategy and resource to manage social media channels and communities.

There have been examples in the past caused by the time lag between an outsourced agency managing social media platforms, and the need to get their clients' input following unexpected servicing

<sup>46</sup> <https://sproutsocial.com/insights/infographics/state-of-social-team/>

or brand reputational issues. A high-profile example is UK retailer Waitrose's agency's slow responses to high levels of criticism about a supplier connected with GM food production techniques.

In the time that it took for the agency managing the Facebook Page to get an approved communications "line" from Waitrose, the Page was overrun by angry customers and commentators criticising Waitrose, given the supermarket's policy of not allowing any GM ingredients in its own brand food.

Some interviewees have completely moved social media owned and paid activity in house. Others spoke highly of their agencies in providing help, guidance and support across campaign development and out-of-hours support.

There are pros and cons for both of these approaches. Agencies need to stay abreast of changes to social platforms, content and advertising formats, and ideally have access to data across a number of clients and industries. With this in hand they are often able to provide valuable context and a framework for success.

Agencies can also provide extra bodies and resource to teams that are already stretched, for ad hoc out-of-hours and surge support. Moreover, they can be great sources of creative thinking that can create earned attention in social media, especially to marketers who have to grapple with the day-to-day elements of brand management.

However, it is hard to replicate the speed and efficiency of a highly skilled, joined-up internally resourced social media team who are working to a common set of objectives.

Almost every interviewee for this report said that the optimum model is resourcing with a small internal team for social media community management across owned and earned activity, with creative, planning and support from a number of different agency types or consultants, including PR, media, digital and advertising agencies.

One respondent found the best model was to have an agency account manager sitting on a shared desk with their team to provide day-to-day, in-hours community management, reactive creative responses and planning/measurement support.

## How are you structured for social media? What is the best way of working with agencies?

"We have an in-house agency that works across the whole of the organisation. The majority of our earned and paid digital marketing activity is managed in house. This includes social media, SEO, PPC etc."

— Tom Barker, Head of Digital, National Trust

"We are increasingly running all social media community management and advertising in-house but do work with a small network of trusted partners who understand the nuances of book advertising. We have a dedicated resource for our brand social channels and for each of audience interest areas where we are active on social (cookery, crime, women's fiction etc.)."

"We find the best way to work with agencies is to be really clear upfront about what you are trying to achieve. Having shared objectives and an SLA in place around our expectations for the support and optimisation of social campaigns is incredibly important."

"Making sure there is a regular cadence for reporting is also really crucial. When agencies are suggesting new advertising formats or community management approach we like to make sure there is a test and control set up where possible to understand the incremental value of doing things differently."

## How are you structured for social media? What is the best way of working with agencies?

We also document successful campaigns and high-performing targeting sets and share them widely so that we're not starting from zero with each new campaign and have potentially saved a few days of optimisation.”

— Albert Hogan, Director – Group Marketing, Audience & Digital Development, Penguin Random House

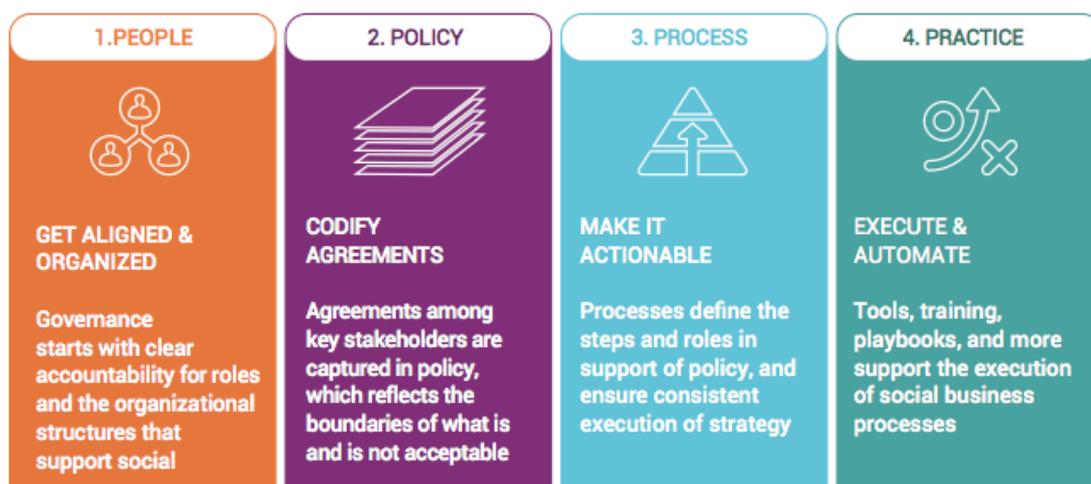
Regardless of the size of the organisation, there are some essentials that all individuals or teams responsible for social media must undertake. These are related to people, policies, process and practice.

### 5.4 Policy and processes

Developing an operating model to define structure, organisational accountability, resources and core competencies/skills for social media activity is a foundational element of any social media strategy.

Another core element is the creation of policies and processes to make it happen.

**Figure 25: How people, policy, process and practice interplay in the development of a social media strategy**



Source: Altimeter's social governance strategy<sup>47</sup>

Interviewees for this report spoke of broadly similar approaches to the development of their social media policies and processes.

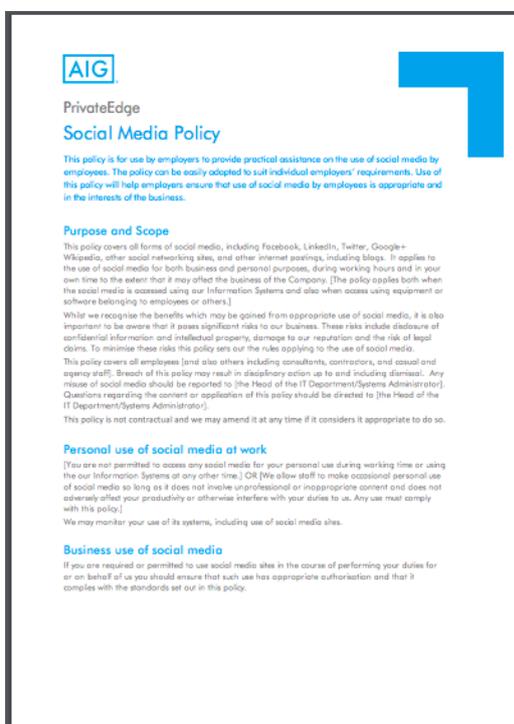
All of them have a social media policy. This is a corporate code of conduct that provides guidelines for employees and external partners, such as agencies. It sets clear expectations for appropriate behaviour, defines potential legal problems and states potential reputational risk and rules for what types of information can and cannot be shared.

For some organisations simply adapting existing policies, such as a code of conduct, privacy, confidentiality, acceptable use or security, policy is the preferred approach. Other organisations have developed a separate social media policy.

<sup>47</sup> <http://www.altimetergroup.com/work-with-us/challenges-we-solve/governance-risk-management>

Most organisations have created short, usable, user-friendly policies that are simple to understand and adhere to.

**Figure 26: Some organisations make their social media policies publicly available, such as the global insurance company AIG**



Source: AIG<sup>48</sup>

Defining the processes for monitoring/listening, creating, engaging, promoting, reporting and evaluating social media is critical.

The social media policy should also include the development or adaptation of supporting processes, such as escalation processes for communications and customer service, brand, content and tone of voice guidelines, community 'house rules', and most importantly, planning and measurement frameworks.

Again, social media can be included in existing processes or specific social processes can be developed separately. If the latter is the case, it is critical to align social to current business processes rather than deviate.

Dependent on the organisation's goals for using social media, it may be necessary to develop and embed specific policies. Common processes and policies connected to social media strategies include community management guidelines and crisis and issues management guidelines.

<sup>48</sup> <https://www.aig.co.uk/content/dam/aig/emea/united-kingdom/documents/Financial-lines/PrivateEdge/epl/social-media-policy.pdf>

Figure 27: The Royal Family community management guidelines



Source: The Royal Family<sup>49</sup>

## 5.5 Tools

There are two main questions organisations need to answer here:

1. Which resources and tools are required to manage and measure social media strategy effectiveness?
2. How does social media fit with the organisation's current investment in marketing technology?

Typically, small organisations and those yet to prove ROI manage platforms directly use a blend of free and low-cost tools to manage and measure activity. This usually includes the platforms' – Facebook, Twitter, LinkedIn and Instagram's – native management and analytic tools for organic and paid activity.

Some use management tools such as TweetDeck, Buffer or Hootsuite to help monitor, manage, schedule and measure their social media activity. Others use a complex range of connected tools to manage the data, workflows and cascades around social media. Some of these may be a part of a bigger investment in a martech stack.

With the increased importance of data, data management, marketing automation, social media advertising and servicing, how an organisation builds its martech stack is becoming ever more complex and can be a minefield if the features of specific tools are allowed to dictate the organisation's social strategy.

Once the business case and ROI for social media has been established, social media strategists are often able make a business case for the tools that can help them.

## 5.6 Categories of social media tools

These tools can broadly be divided into the following categories (please note, this is not a comprehensive vendor list but for guidance only).

Increasingly, vendors are creating end-to-end solutions or building social media capabilities into their products (e.g. Adobe, which integrates social capabilities into various Adobe Experience Cloud solutions<sup>50</sup>). There have been significant mergers in the social technology space such as Brandwatch merging with BuzzSumo and Crimson Hexagon.<sup>51</sup>

<sup>49</sup> <https://www.royal.uk/social-media-community-guidelines>

<sup>50</sup> [https://www.adobe.com/mena\\_en/experience-cloud/social-integration.html](https://www.adobe.com/mena_en/experience-cloud/social-integration.html)

<sup>51</sup> <https://techcrunch.com/2018/10/04/social-intelligence-platforms-brandwatch-and-crimson-hexagon-merge/>

**Table 3: Categories of social media tools**

Tool category	Typical uses	Example vendors
Social listening/social media monitoring tools	<ul style="list-style-type: none"> <li>Social media analytics</li> <li>Competitor analysis</li> <li>Share of voice analysis</li> <li>Brand health</li> <li>Audience research</li> <li>Influencer analysis</li> <li>Market trends</li> <li>Crisis and issues identification</li> <li>Innovation opportunities</li> <li>Purchase Intent</li> </ul>	<ul style="list-style-type: none"> <li>Brandwatch</li> <li>Sysomos</li> <li>Radian 6</li> <li>Talkwalker</li> <li>Pulsar</li> </ul>
Social media management tools	<ul style="list-style-type: none"> <li>Social media asset management</li> <li>Multiple social platform posting, scheduling and monitoring</li> <li>Social media engagement</li> <li>Team collaboration</li> <li>Social media advertising</li> <li>Social media analytics</li> </ul>	<ul style="list-style-type: none"> <li>Sprinklr</li> <li>Spredfast</li> <li>Sprout Social</li> <li>Hootsuite</li> <li>Buffer</li> </ul>
Social analytics tools	<ul style="list-style-type: none"> <li>Funnel analytics</li> <li>Social channel analytics</li> <li>Campaign analysis</li> <li>Platform performance/comparison</li> <li>Attribution analysis</li> </ul>	<ul style="list-style-type: none"> <li>Google Analytics</li> <li>Adobe Analytics</li> <li>Simply Measured</li> <li>Social Bakers</li> </ul>
Social influencer tools	<ul style="list-style-type: none"> <li>Influencer identification</li> <li>Influencer database</li> <li>Influencer engagement</li> <li>Campaign management</li> <li>Campaign reporting</li> </ul>	<ul style="list-style-type: none"> <li>Traackr</li> <li>Insightpool</li> <li>Econsultancy's <a href="#">Influencer Intelligence Tool</a></li> </ul>

Source: Michelle Goodall

### Which social media tools do you use? Any thoughts on which blend is best?

“We use a range of social media tools, particularly for community management, sentiment analysis, analytics and advertising experiments. We always try to run our social platforms from a place of insight and data, but for us there is an important need to balance art and science.

“We use tools to increase productivity or to improve performance, but we feel strongly that the best measure is human to human interaction on social. While tools are getting increasingly sophisticated there is still a shortfall, particularly in understanding the nuance of human interaction. Sentiment analysis still struggles to understand sarcasm for instance.”

— Albert Hogan, Director, Global Marketing, Audience & Digital Development, Penguin Random House

“We use so many tools connected to our social media activity, from influencer identification tools (tools that help us identify the most successful content types and content that different audiences want), social media management, marketing automation, content tagging, social media monitoring, attribution analysis, reporting, social servicing tools, social content production tools. The list goes on.

## Which social media tools do you use? Any thoughts on which blend is best?

“It can be such an overwhelming choice. There are more vendors and more tool types every year. My recommendations are:

1. Never start with the tool first.
2. Try the free/cheap and easiest-to-use tools first and adapt if they don't suit your needs.”

— Marketing Director, financial services

“We have really limited funds so we use Sprout Social. It's great value.”

— Head of Digital, charity

Formalised skills development through a number of techniques (peer-to-peer coaching, formal skills development workshops, elearning etc) should be ongoing; as the organisation's strategy and channels adapt, more staff will need to upskill in social media, and some may need to learn specific skills. See Econsultancy's [How Marketers Learn](#) report for a more detailed analysis around learning and development.

An example of a significant skills development requirement in relation to social media is the pivot towards video- and image-based social content. Those responsible for social media output not only have to understand what does and what does not work across a number of platforms, but in many cases have had to learn how to develop entirely new social media content formats (e.g. data visualisations, memes, gifs, etc.).

Playbooks are useful ways of communicating how to 'do' social media in your chosen channels, and as channels develop and evolve, so will the organisation's channel strategy and playbooks.

The UK government's digital engagement teams have created a Social Media Playbook as a resource for anyone managing social media in the UK government.

## Social media playbooks

“The UK government's Social Media Playbook is a resource for anyone managing UK government social media in the UK government.



**Social Media Playbook**

**Social Media Playbook**

**GDS Digital Engagement**

The Digital Engagement and Design team are responsible for communicating about GOV.UK and the digital transformation of government services in the UK.

Find out more.

**Categories**

Select Category

**Social Media Playbook**

Read the full playbook here.

**Recent posts**

- Periscope about service design in government
- Making things clear and correct with collaborative scriptwriting
- Looking back at Sprint 16
- Part 2: Insight into managing online

Source: GDS Digital Engagement blog<sup>52</sup>

<sup>52</sup> <https://gdsengagement.blog.gov.uk/playbook/>

## Social media playbooks

“It’s not a definitive article, as a good social media strategy will always be bespoke to individual needs. We talk about: setting objectives; listening; community management; the creation of content; social media at events; evaluation; a few general social media channel tips, and outline our own approaches with examples.

“The GDS (Government Digital Service) approach to social media is the same as the overall GDS approach: simpler, clearer, faster. Our focus remains fixed on meeting user needs.

“We’re not interested in campaigns with dancing ponies (although we think they’re great). We’re interested in connecting with the people who care about what we’re doing, sharing the learnings from the work that we do, and helping our users as promptly and effectively as we can.”

— GDS Digital Engagement Team<sup>53</sup>

<sup>53</sup> <https://gdsengagement.blog.gov.uk/playbook/>

# 6. Activity Planning

Planning social media activity should mirror any strategic element of the business. Many organisations use existing marketing and communications planning processes to develop their social media activity.

This report provides a useful planning framework for this, in the Econsultancy PROSPER framework in *Section 3*. Whether the business does use or adapt this general planning framework to include social media or uses its own, the key areas for consideration for tactical activity planning after the preparation and research phases are:

## 1. Setting aims, objectives, measurements and KPIs

Be clear on what any social media activity will achieve for the organisation. Align social media aims against long- and short-term business goals as well as departmental goals and objectives.

## 2. Defining audiences and where social media sits in the customer journey or sales funnel

Define and segment the organisation's audiences. Detail how social media can play an integral part in communicating with these audiences, which channels are appropriate, which types of presence and which key messages the brand wishes to deliver.

Activity should be user-focused. Understanding typical customer journeys for these distinct audiences and the role that social media plays in those journeys (e.g. what role social media plays in retention and advocacy for active/loyal customers and what content, experiences and messages will drive this) can help the business support customers better as they move through the stages in their journey.

Most organisations will have undertaken some form of audience segmentation for their digital, marketing or communications activity, whether as a part of their CRM, marketing automation or web development activity. If possible, build upon these audience segments to help choose channels, messages, content etc.

Remember, for most organisations, audiences will not only be consumers and customers, but also a mix of internal (employees) and external stakeholders (media, partners, policymakers etc.).

Many organisations are also using social media to develop and support their employer brand and are effectively making cost savings by recruiting brilliantly through social channels and employee advocacy programmes in social media.

Platforms such as Facebook encourage advertisers to consider where audiences are in their customer journey in their ad management platforms (*Figure 28*).

**Figure 28: Facebook’s ad management platform**

What's your marketing objective? [Help: Choosing an Objective](#)

Awareness	Consideration	Conversion
Brand awareness	Traffic	Conversions
Reach	Engagement	Catalog sales
	App installs	Store traffic
	Video views	
	Lead generation	
	Messages	

Source: Facebook

### 3. Choosing the right channels and creating a channel strategy

Based on the organisation’s aims/objectives, resource levels and commitment to engagement, it will also be necessary to decide which channels the brand will have a presence in. Do the brand have a specific channel strategy? How will channels work together to promote its social content? How do its paid and organic activity align? And how does this link back to the organisation’s overarching aims and objectives for social media?

An example of a highly summarised (and fictional!) platform strategy might look like this:

#### **@Econsultancy (main Twitter feed):**

- Support all markets and core business-building objectives (subscriptions, training, digital transformation consultancy, tools, jobs, events etc.).
- Build the brand globally.
- Reach new high-value users and customer prospects with highly visual and useful content (blog posts, research data, news, case studies etc.).
- Categorise existing audiences and engage with relevant comments/posts to increase visibility and loyalty.
- Remarket to prospects to assist with conversions post-website visit.
- Connect and engage with topic experts and influencers for visibility and reach.
- Provide customer support.
- Identify emergent and hot topics for site content/messaging.
- Provide backchannel to key events to support attendees and drive interest in future attendance.

Figure 29: Econsultancy's Twitter feed



Source: Econsultancy

#### 4. Defining resources

Businesses must also define who will be responsible for social media within the organisation and which support roles it requires from staff, agencies, partners etc.

Are there workflows for content creation, communications cascades and issues management?

How will social media activity and engagement be resourced?

#### 5. Integration

It is important to note that 'social media integration' can mean different things to different organisations. For example:

- Integrating aims and objectives across all teams and departments who are affected by social media.
- Integrating paid, owned, earned and shared social media strategy with content and communications.
- Integrating online and offline campaign activity by using social media to promote, generate awareness of and increase engagement with offline events/activities and amplifying or extending the reach of the campaign after events/activities.
- Integrating social media with all digital, traditional marketing and communications channels (search, email etc.).
- Integrating social media with marketing automation, content management and other martech tools.
- Integrating social media with sales processes and tools.
- Embedding social media content into the company website.
- Enabling social sharing on the company website.

- Enabling social media logins, i.e. using existing login information from a social networking service such as Facebook or Twitter to sign into or register for a third-party website so that new users do not need to create an account specifically for the site.
- Integrating Facebook Messenger and AI in social platforms into the customer experience and customer service processes and service design, which the Service Design Network describes as “the activity of planning and organising people, infrastructure, communication and material components of a service in order to improve its quality and the interaction between service provider and customers”.<sup>54</sup>
- Integrating social media into the sales cycle.

Organisations that have deeply embedded social media generally have an integrated planning and delivery team for social media, whose typical departments might include those detailed in *Table 4*.

**Table 4: Summary of how social media can support departments and aid organisational integration**

Department	How social media typically supports them*
Communications	Message mapping, influencer identification, amplifying reach and impact of communications campaigns (e.g. thought leadership, influencer or analyst relations), internal communications
Marketing	Benchmarking, advertising, remarketing, filling sales pipeline, amplifying reach and impact of marketing campaigns
Sales / business development	Identifying pain points in buying cycle, competitor analysis, nurture and nudge sales prospects and leads, social commerce
Customer service	Social media servicing, complaints handling, AI and bots in direct messaging servicing, e.g. Facebook Messenger
Insights / product development	Reporting product usage or service quality insights, cultural or local pain and passion points, feature likes/dislikes
Ecommerce	Highlighting conversion pain points and issues, identifying partners (e.g. distribution), social commerce
HR	Recruitment, talent retention, employer branding
IT	Tend to provide support role
Compliance	Tend to provide support role

*Source: Michelle Goodall*

Including social sharing buttons on a website is another integration consideration. The New York Times provides an elegant example of this, supporting Facebook, Twitter, LinkedIn and Reddit.

<sup>54</sup> <https://trydesignlab.com/blog/what-is-service-design/>

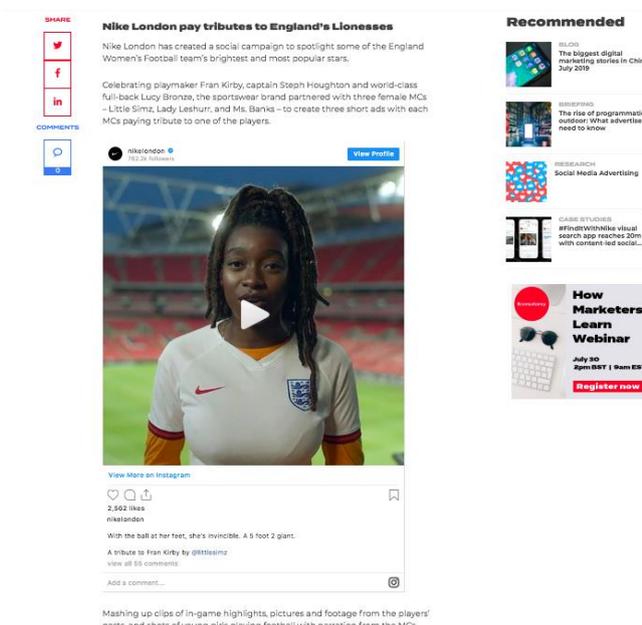
**Figure 30: New York Times social sharing buttons**



Source: *New York Times*<sup>55</sup>

Econsultancy's blog posts frequently use embedded social media posts from Twitter, Facebook and Instagram to illustrate key points made in the article.

**Figure 31: Example of Econsultancy embedded social posts**



Source: *Econsultancy*<sup>56,57</sup>

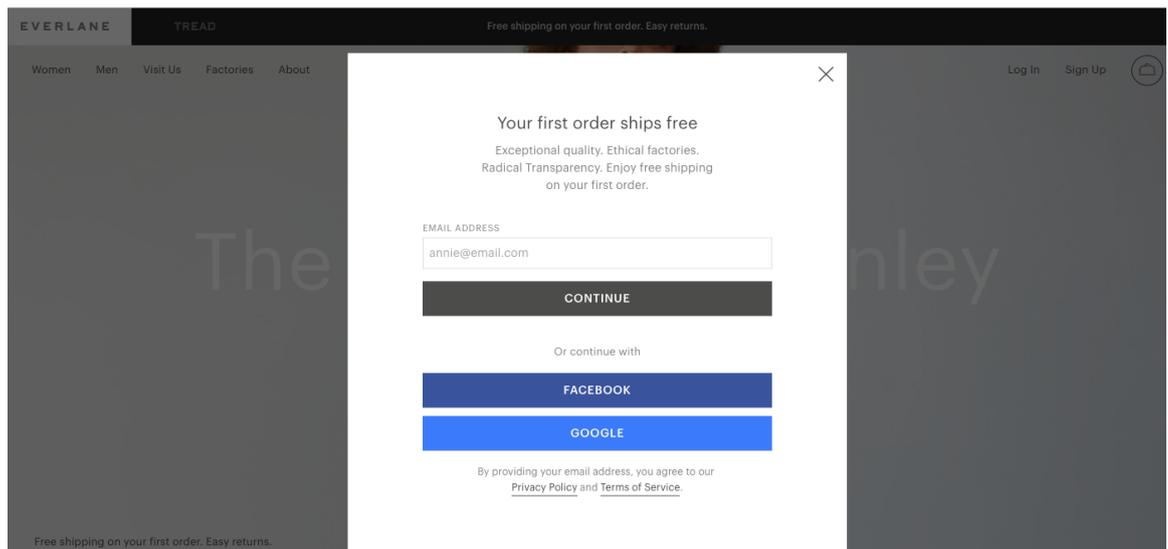
Ethical clothing retailer Everlane favours deep integration with social media platforms, using social logins.

<sup>55</sup> <https://www.nytimes.com/>

<sup>56</sup> <https://econsultancy.com/the-best-social-media-stories-campaigns-from-june-2019/>

<sup>57</sup> <https://www.econsultancy.com/blog/70005-nine-less-obvious-brands-offering-great-customer-experiences>

**Figure 32: Ethical retailer Everlane uses social logins to simplify the sign in process**



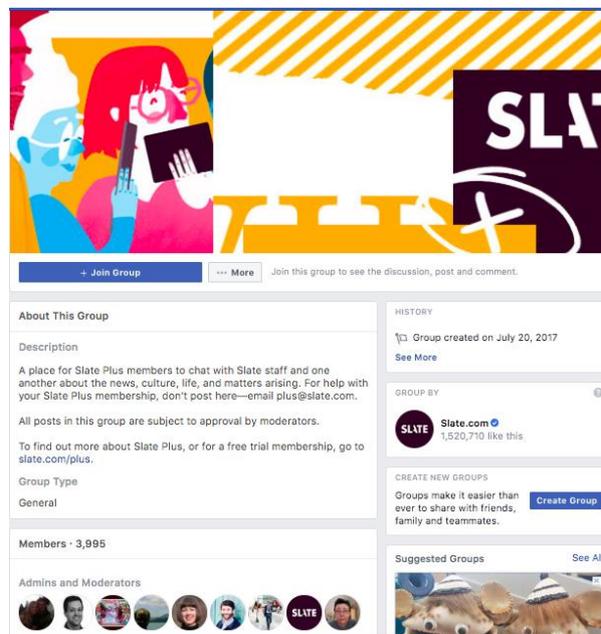
Source: Everlane<sup>58</sup>

## 6. Creating workflows

Creation of workflows, guidelines and guidance supports and protects staff in equal measures. The development of community moderation policies or 'house rules' in line with the organisation's chosen social media platforms is also critical as is the importance of crises and issues evaluation, and escalation processes to ensure product, service or reputational risks are identified and managed appropriately.

For example, Slate.com's members only Facebook Group highlights that the community will be moderated but all membership-related enquiries should be emailed.

**Figure 33: Slate Plus' Facebook Group description is clear about contact type and channels**



Source: Facebook – Slate Plus Members Group<sup>59</sup>

<sup>58</sup> <https://www.everlane.com/>

<sup>59</sup> <https://www.facebook.com/groups/slateplus/>

## 7. Planning and managing content

Content calendars should be used to plan and manage the content workflow. This will ensure that the organisation plans always-on and campaign activity appropriately. Calendars and planners provide a clear indication of how social media aligns to a content strategy and ensures that there is time, resource and budget to be able to take advantage of reactive engagement opportunities.

They should include, at the very least:

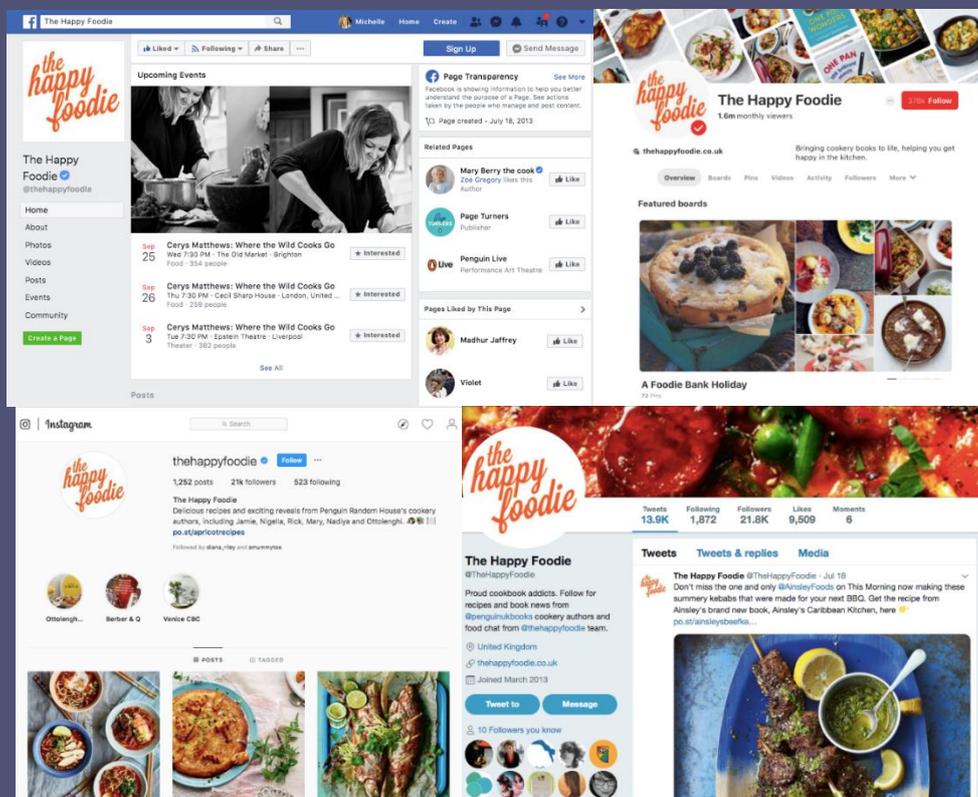
- Aims/objectives for content
- Content themes
- Content formats/types
- Audiences (customer journeys)
- Channels for distribution
- Publication date
- KPIs.

Organisations with effective social media content plans often categorise their activity as priority or core (essential elements of their marketing and communications messaging), campaign-driven (e.g. supporting key events, product/service launches or new policies) and reactive, or agile.

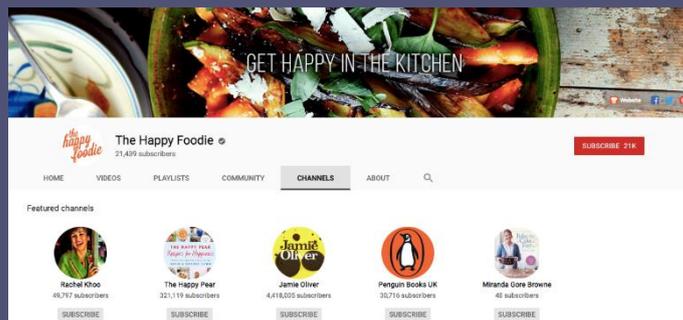
### What is your planning process for social media content?

“With several hundred new books released every month, planning is key to the success of our social channels. We run a master social calendar capturing the priorities and expectations of our various publishing houses across Penguin Random House.

Figure 34: Penguin Random House’s brand The Happy Foodie’s presence across social channels



## What is your planning process for social media content?



Source: *The Happy Foodie's* Facebook<sup>60</sup>, Pinterest<sup>61</sup>, Instagram<sup>62</sup>, Twitter<sup>63</sup>, YouTube<sup>64</sup> Pages

*The Happy Foodie* is one of the many brands belonging to publisher Penguin Random House. Its social channels highlight the result of meticulous content planning and alignment with author social channels and each publishing house

“We map key consumer moments into the plan and try to match up our books with relevant topics and events throughout the year. We also keep some capacity in the plan for tactical social activity, moving on trending topics and news events to ensure we are not stuck in a never-ending cycle of uncontextualised promotional posts.

“An important part of our planning is to ensure there are days in the week that are known for particular types of discussion on our social platforms. Monday is discussion about what people read at the weekend, Wednesday is recommendation day, Thursday is eBook deals day and so on.

“We have a daily quote on the Penguin Twitter account shared during the morning commute that is eagerly anticipated by our followers and a large amount of preparation is put into making sure we keep the quality and the relevance of the daily quote intact.

“We also spend a lot of time interacting with our authors on social, so making sure we bring them into the conversation is really important. This can require lots of forward thinking and planning to maximise the opportunity and reach that our authors bring to the table.”

— Albert Hogan, Director, Group Marketing, Audience & Digital Development, Penguin Random House

### 8. Testing and optimising creative

Social media offers real-time insights into whether the brand's creative and content are having the impact required. Different social platforms create different behaviours that can be optimised for with the brand's creative and message (e.g. swipe up, thumb-to-stop, share, like, heart, send a chat, react etc.).

On a practical level, platforms require different image/video sizes, lengths, etc.

Users' expectations on social channels are being shaped on an ongoing basis. Video that might work on YouTube, where users are used to longer landscape format videos, can fail on Facebook or Twitter where users are likely to view on a mobile, with audio turned off.

<sup>60</sup> <https://www.facebook.com/pg/thehappyfoodie/>

<sup>61</sup> <https://www.pinterest.co.uk/happyfoodieuk/>

<sup>62</sup> <https://www.instagram.com/thehappyfoodie/>

<sup>63</sup> <https://twitter.com/thehappyfoodie>

<sup>64</sup> <https://www.youtube.com/user/HappyFoodieUK>

New content formats such as stories have their own creative norms. Good creative questions to ask are ones such as:

- How many story frames are optimal for our beauty brand promoting a new product?
- Does the addition of story features, such as Question Stickers, affect clickthrough rates?
- Which video lengths have positive effects on our view-through rates?

It is critical to evaluate and continually test creative, timing and messaging for both organic and paid posts.

Brands should look to media owners, such as publishers and broadcasters, whose social teams and journalists have targets in terms of shares, views, clickthroughs etc., and post many content formats across multiple social channels each day.

Researching how brands such as Vice, Channel 4 and the BBC have all adapted their video content over the past few years is a live study into social media content optimisation.

The author co-presented at a conference when UK broadcaster Channel 4 was discussing how to optimise Facebook video. It found that being highly selective about news topics, using large captions and a dramatic thumbnail image were optimal elements in creating social news videos for Facebook.

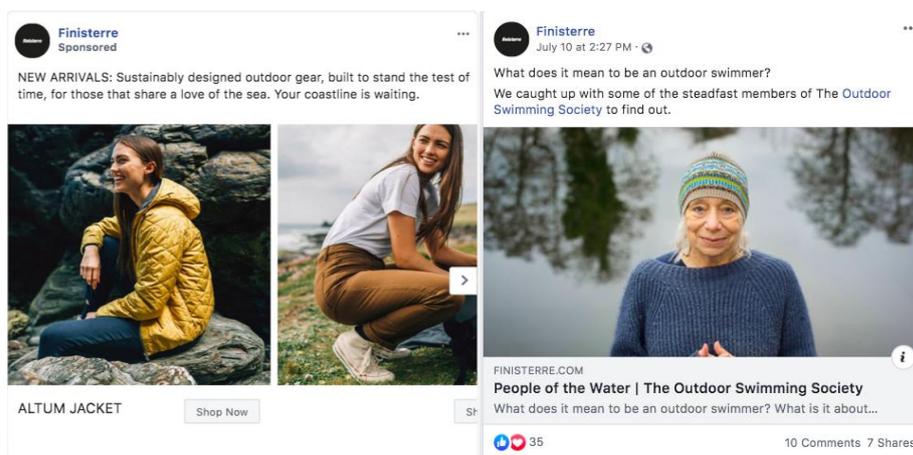
Channel 4 is continually optimising its video for specific channels. For example, in the space of four days it changed its IGTV video thumbnails on its news IGTV channel to lose captions, but has added them for political video thumbnails. It clearly uses data on an ongoing basis to help it decide on changes to its format.

Ethical surf brand Finisterre uses multiple organic posts and advertising formats to drive sales and loyalty, as well as deliver key messages related to its brand values and ethics for upper funnel awareness. The photography and videography is high quality.

The brand's message and content is highly targeted to specific audience segments (loyal customers, abandoned basket prospects, male, female, by product, purchase type, etc.) at different parts of the customer journey.

Finisterre can be seen testing Facebook's evolving advertising formats (dynamic product ads, carousels, 360 video etc.) and is a source of inspiration for both small and large consumer brands.

**Figure 35: Ethical surf brand Finisterre successfully uses multiple organic and advertising formats**





Source: Facebook / Finisterre<sup>65</sup>

## Social media content best practice

### The nature of the content determines the social media platform and content type

“We never operate with the approach that we’re trying to do everything everywhere in social media. The social media content that we create will be based on resource we have available on any given day and the nature of the story. For example, is the story highly visual, or is it an important story, but by its nature, an extremely dry subject? This is usually the first question that we ask ourselves as this determines the content and platforms we choose.

“If it’s visual then it’s likely we’ll focus on Instagram and develop more live content. If it’s a dry, important subject and less visual, it’s likely we’ll go down the Twitter/Twitter Moments route or we’ll create a highly produced video for placement on Facebook, YouTube or Twitter.”

### The human angle in social media content is as important now as it ever was

“We look at news stories and ask: is there any way of turning it on its head? Are there any human angles or can we inject a sense of relevance to our audiences? Is there something that people can apply to their everyday life, or can they look in the mirror and say ‘yes, this applies to me’? If we can, then the content lends itself better to Facebook. This is where stories that create more social interaction resonate best.

“Some stories can develop and then we adapt and create content for different platforms. For example, we had a story about a high street retailer that was a fairly dry but important story, so it was placed on Twitter in the morning.

“As the day went on, we developed the same story, but with a more human and relatable angle for Facebook. The challenge is finding a way to make it interesting – the traditional news vox pop... approach doesn’t work in social media.

“One of the challenges is having the time to think laterally about news subjects or content, especially if you are operating in a real-time social media environment. Some subjects are easy, e.g. banning plastic straws, others are much more difficult.

<sup>65</sup> <https://www.facebook.com/FinisterreUK1/>

## Social media content best practice

### What content works well on Instagram?

“You could look at our Instagram feed, without looking at the data, and tell which stories perform most strongly. You’d think anything involving a dancing cat would do well, but frankly there are a lot of dancing cats on Instagram. If we were to give audiences endless stories about children in Syria that won’t work either. We have to ensure we maintain a balance.

“One of our most successful stories was ‘Henna Crown’ a highly visual video story of a woman who had lost her hair during chemotherapy being given a beautiful Henna crown.



Source: Instagram / BBC News

“This worked because:

- The subject and subject matter are highly engaging and relatable
- It was created by a professional digital video editor. They know how to construct the story for such a visual platform, using short-form video storytelling techniques
- Everyone knows someone who has been affected by cancer in some way

“If I were to give some advice on how to create successful social media content it could be summarised by your ability to be able to tick these the composite elements:

- Is this a subject that will resonate with a significant percentage of your audience?
- Is there a person that you can focus on at the centre of the story who is relatable, and can bring the story to life?
- Can you illustrate the story in a way that people will give you their time to read, listen or watch?

“If you can check off these three elements – regardless of whether you are a news organisation or not – then you have the recipe for a successful piece of social media content.”

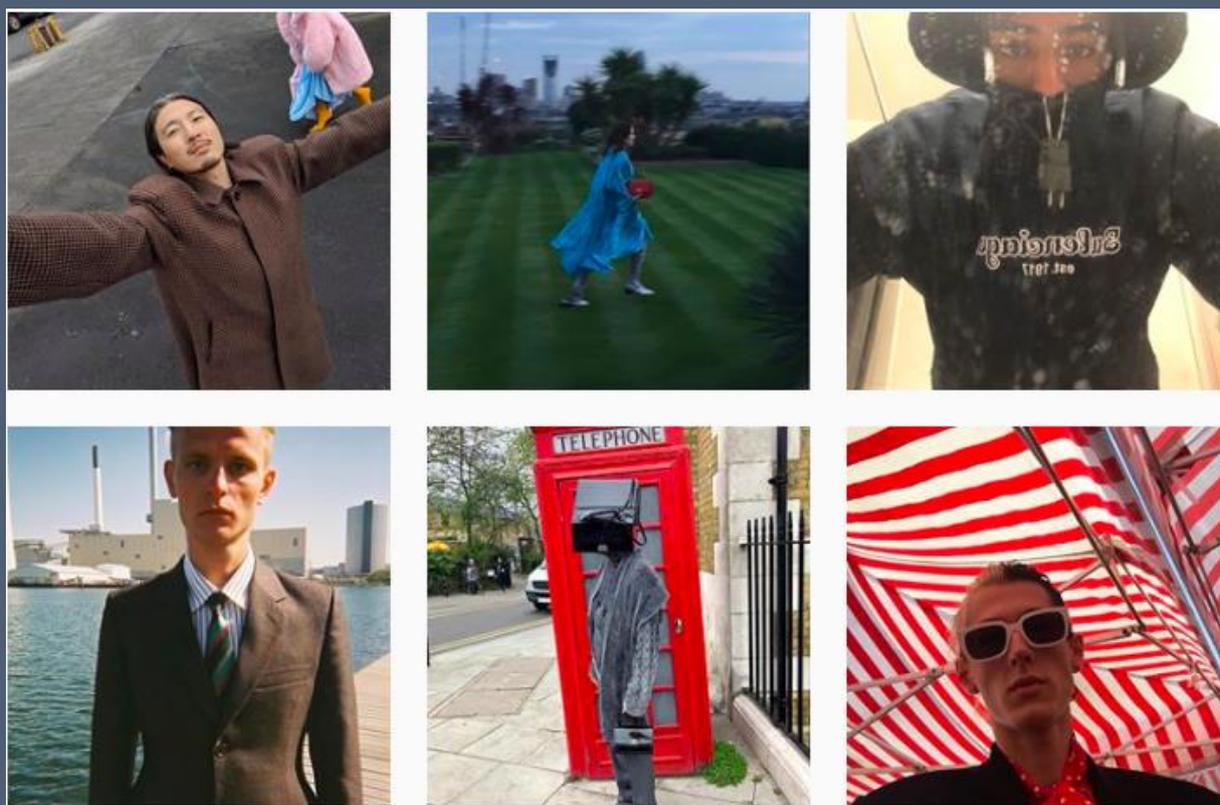
— Mark Frankel, former Social Media Editor, BBC News

## Social content has 'fashions'

"Currently there is a backlash against airbrushed, advertising style visuals on Instagram, and a move towards a more true to life photography style.

"A brand which is embracing this is Balenciaga. Its Instagram feed – followed by 9 million people – is where the high-end fashion label is able to take on a more editorial, documentary style aesthetic."

**Figure 36: Fashion brand Balenciaga's Instagram posts are imperfect and more authentic than those of most luxury fashion brands**



Source: Balenciaga's Instagram feed<sup>66</sup>

— Helen Wood, Head of Content + Publishing, H+K Strategies UK

### 9. Measuring and evaluating success

Choose measurement tools and ensure any social content is tagged for analysis. Create frameworks to measure whether social media is enabling the organisation to reach its goals and to evaluate its relative effectiveness against other channels.

### 10. Maintaining an evaluation loop

Business insights determined from social media monitoring, engagement and measurement must be looped back into the organisation to ensure ongoing efficiencies and effectiveness. Consider the best ways to do this through effective reporting and sponsorship at the highest possible level in the organisation.

<sup>66</sup> Source: <https://www.instagram.com/balenciaga/>

# 7. Aligning to Content Strategy

For those organisations that have not clearly defined their content strategy, social media will continue to be a place where content is published with limited focus, and therefore, limited success. Econsultancy's [Digital Content Strategy Best Practice Guide](#) has been written to help marketers understand the connection between social media and content strategy.

Broadly, an organisation's content must be aligned to the following:

- Brand guidelines
- Tone of voice/editorial guidelines
- Any communication/marketing messaging framework in use
- A content strategy – content taxonomy, tags and other considerations such as approvals, standards, archiving rules etc.
- Any industry or sector-specific guidance, e.g. financial services, pharmaceuticals etc.
- Legal governance, e.g. intellectual property, data protection laws etc.

Use a content calendar to plan and manage the content workflow. For more information about what a content strategy should include, refer to point 7 in *Section 6, Activity Planning*.

A simple way of creating a focus for the organisation's efforts, and to ensure that they help the brand achieve its aims, is completing the following statement:

*"The content that we use helps our organisation/business/brand **[insert goal]** and **[insert goal]** by providing **[insert adjective]** and **[insert adjective]** content that makes **[insert audience/s]** feel **[insert emotion]** so that they can **[insert task]**."*

The following examples complete the statement for a small skincare business and a Software-as-a-Service (SaaS) brand:

*"The content that we use helps our organisation/business/brand **reach new customers and retain and grow existing customers** by providing **helpful** and **empathic** content that makes **people with sensitive skin** feel **understood** so that they can **feel more confident and get on with their lives**."*

*"The content that we use helps our organisation/business/brand **reach new purchase influencers** by providing **clear** and **persuasive** content that makes **marketers and communicators** feel **well informed and smart** so that they can **create a business case for key organisational decision-makers**."*

## 7.1 Governance

As well as internal governance (i.e. ensuring the brand's social media efforts adhere to existing organisational requirements such as conduct, privacy, confidentiality, etc.), all organisations need to consider broad legal frameworks, guidance from relevant regulatory and trade bodies and the terms of use from the social media platforms themselves.

This aspect of social media governance should outline and address important aspects of the legal, regulatory and advisory domains affecting social media activity.

***It must be noted that the following does not constitute legal advice and specific legal advice should always be sought. Econsultancy accepts no liability for any action taken or not taken as a result of this information.***

## 7.2 Legal considerations

Many of the legal considerations associated with print and broadcast media are relevant. In the absence of legislation relating specifically to social media, country law has tended to use established areas of the law as a guide.

This report is intended for a global audience, though rather than use specific areas of legislation, it will consider the UK legal framework as the basis for areas that should be considered.

Each country will have its uniquely important areas of legislation, but in the UK, there are several areas of legislation to consider:

1. Intellectual property (Creative Commons, copyright and trademarks)
2. Law of Confidence
3. Defamation
4. Consumer Protection from Unfair Trading Regulations (2008)
5. Data Protection (1998)
6. Privacy (Human Rights, 1998)
7. The General Data Protection Regulation.

### 7.2.1 Intellectual Property (IP)

Photography, video, audio and text and image content have an economic and moral value to their producers. When creating or using content there a number of areas to consider, including copyright and trademarks.

In most cases, the copyright owner needs to give permission for the material to be used, although there are exceptions to this. The concept of fair use in copyright law allows for certain actions; for example, there is provision for quoting from publicly available material if the source is cited, its use can be justified and only the necessary amount is included.

- Ensure that the IP owner is contacted, gives permission and is credited as the creator of the material.
- Ensure that you have considered the appropriate use of 'Rights Managed' (RM) as well as 'Royalty Free' (RF) assets.
- Agree terms of usage and the IP owner's right to be financially rewarded if you use their material.
- Consider how the brand copyrights its content, e.g. consider distributing and using Creative Commons<sup>67</sup> licensed content where possible and appropriate.
- Ensure marketers are aware of trademark rights and authorisation (e.g. logos, slogans and words, and 'signs' used to distinguish products or services of one company from another).
- Trademark owners have the right to prevent unauthorised use of that trademark, for example, Facebook is explicit about usage of its trademark and also provides guidance to others policing its trademark.<sup>68</sup>

<sup>67</sup> <http://creativecommons.org/>

<sup>68</sup> <https://www.facebook.com/help/223752991080711/>

## 7.2.2 Law of Confidence

Practical examples of circumstances where disclosure/confidentiality laws could be applied in social media include:

- A geo-located tweet announcing a new client account before all details have been finalised.
- Posting financial information about your company on LinkedIn that is not in the public domain.

The rule of thumb here is that caution is everything. If in doubt, it is best to seek guidance from a senior executive and/or the organisation's legal team.

## 7.2.3 Defamation

Defamation is the act of making a statement about a person or company that is considered to harm reputation, for example by lowering others' estimation of that person or company, or by causing them to lose their rank or professional standing.

It varies from country to country but key areas to consider are:

- A company may be held responsible for something an employee has written/said on a company-sanctioned space, such as a social media channel.
- A person who repeats, retweets or links to defamatory and libellous information from another source is not exempt from the law.
- A company that provides a forum for comments can be liable for defamatory statements they host.
- Speculating or adding the term 'allegedly' to online content that links to or repeats defamatory information does not exempt it from the law.

## 7.2.4 Consumer Protection from Unfair Trading Regulations

This UK law protects UK consumers against unfair, misleading or aggressive practices. It essentially puts the onus on organisations to be transparent about their promotional practices in social media.

The speed of development in this particular area in relation to influencer marketing through social media varies from country to country.

There have been high-profile cases of influencer marketing and social media product placement that have fallen foul of advertising regulators, such as Mondelez's Oreo brand working with a number of popular British YouTubers to enter a "lick race".

The regulating body deemed that at the time, it was not clear to consumers that the campaign was a paid marketing partnership.<sup>69</sup> The outcome of this high-profile case ensured that both brands and influencers understood the need for clarity in commercial social media promotions, regardless of the partnership model adopted.

Simply flagging the relationship with the brand at some point during the video is now not sufficient in most countries. Commercial relationships must be identified using an appropriate identifier such as '#ad' in the text and some form of text overwrite on images.

Platforms have also developed tools to monetise the relationship between brands and influencers while providing clarity to platform users that the content is an ad. Instagram's Branded Content tools are examples.<sup>70</sup>

<sup>69</sup> <https://www.theguardian.com/media/2014/nov/26/youtube-ad-oreo-banned-advertising-lick-race>

<sup>70</sup> <https://help.instagram.com/292748974937716?helpref=search&sr=4&query=branded+content>

## Figure 37: David Beckham regularly posts high quality 'Paid Partnership' content on Instagram



Source: David Beckham (@davidbeckham)'s Instagram feed<sup>71</sup>

The UK's Advertising Standards Authority (ASA) provides clarity and guidance for both brands and influencers (or creators):

*"When a brand rewards an influencer with a payment, free gift, or other perk, any resulting posts become subject to consumer protection law. When a brand also has control over the content, they become subject to the UK Advertising Code as well."*

Consumers must always be aware when they are being advertised to, and both brands and influencers have a responsibility to ensure the content makes that reality clear upfront. Failure to disclose a commercial relationship leaves both parties at risk of action from the ASA.<sup>72</sup>

Some other areas to also consider within a regulatory and reputational framework are:

- Misleading consumers by participating in creating a false groundswell of opinion through fake posts
- Tweeting or retweeting an unsubstantiated rumour or false statement about another person that may cause "serious harm" to a person's reputation could be libellous under defamation laws.

### 7.2.5 Data Protection, privacy and cookie laws

Some social media campaigns collect data from consumers. Consumer data is being increasingly used to target audiences in ever more sophisticated ways through retargeting and programmatic advertising.

It is critical that the organisation operates within the specific data protection of its country and that it is transparent about how its customer/audience details are being used.

General Data Protection Regulation data privacy laws across Europe, designed to protect and empower all EU citizens and to reshape the way organisations across the region approach data privacy, are being enforced.<sup>73</sup> Businesses who are collecting, storing, managing and using any consumer data will need to be GDPR compliant.

The social platforms encrypt or 'hash' first-party audience data (such as email addresses) uploaded to them for security and assure advertisers that the data is only used to match data with their existing lists

<sup>71</sup> <https://www.instagram.com/p/Bz0l1luBg8E/>

<sup>72</sup> <https://www.asa.org.uk/news/new-guidance-launched-for-social-influencers.html>

<sup>73</sup> <https://www.eugdpr.org/>

of users. However, for some organisations, particularly those in heavily regulated sectors such as finance, this is not enough of an assurance.

Marketers will need to check that they have the correct permissions to legally share any data with a third party, such as social platforms, for advertising purposes.

Now GDPR is in force it is important for advertisers to follow certain guidelines for assessing whether data held can be legally uploaded or on boarded to social platforms, or used in media campaigns.

Again, Econsultancy must stress that this document should not be used as a substitute for legal advice.

Econsultancy has a wealth of detailed and helpful GDPR courses, reports, blog posts and examples that can be used in conjunction with this section.

Econsultancy explores data challenges for advertisers in the complementary report [Social Media Advertising](#) report.

We are at a pivotal point in the social media timeline. There is a clear tension evolving between regulators, consumers, platforms and advertisers. The platforms are under scrutiny. Regulators and users are asking tough questions. This is clearly something that our contributors are all grappling with. Expect much more disruption, media coverage and activism relating to data issues.

Further regulation will happen if governments are unhappy with self-regulation.

In many countries there is no one privacy law. The Human Rights Act (1998) incorporates the right to privacy for both individuals and companies and the law of confidence is connected to the right to privacy.

Key areas to consider are:

- Ensuring marketers in the organisation are clear on cookie law in their country.
- Ensuring data opt-in and privacy statements are up-to-date and compliant.
- Ensuring marketers in the organisation have considered the implications of using first-party data and pixels for social media advertising and retargeting.
- Ensuring the business has systems and processes to safely and compliantly identify and verify customers contacting it through social media for help.
- Ensuring the organisation's social media policy reflects or links to any data policies.
- Ensuring marketers in the organisation have scenario tested any data breaches

## 7.3 Regulatory or sector guidance

Many industries and sectors may have their own guidance or regulatory requirements for the use of social media, particularly in heavily regulated sectors such as healthcare and life science, finance, energy and utilities and gaming industries.

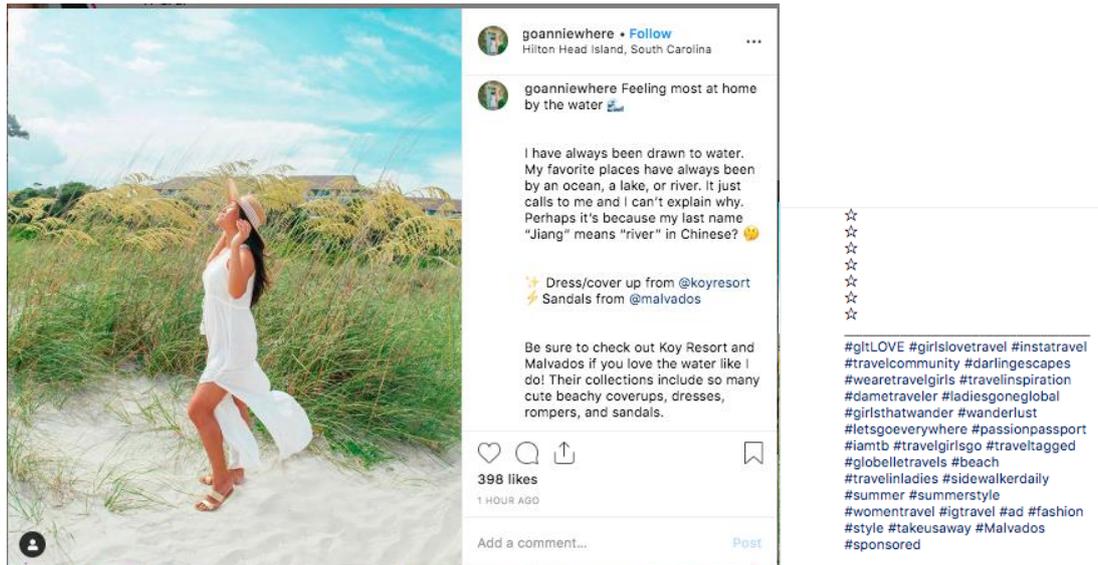
Again, this is likely to be country or region-specific, but marketers must be aware of the impact on their social media activity.

## 7.4 What this looks like in practice

The following examples illustrate how some of these overarching legal guidelines can be understood in practice:

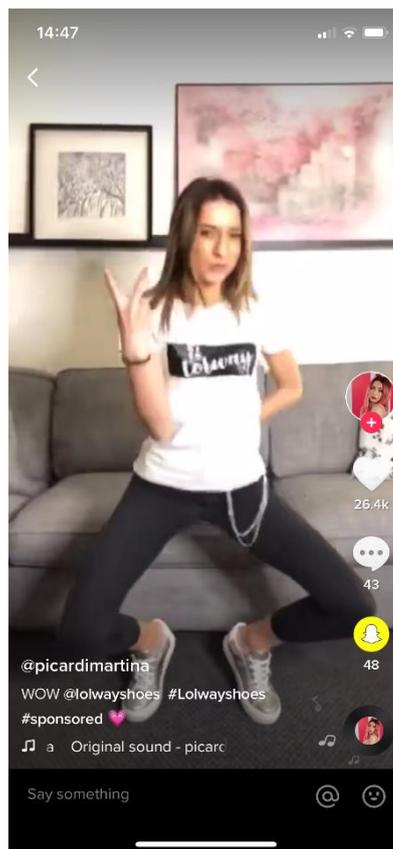
- **Video and photo content.** Ensure that there is a clear acknowledgement in the video content that it is paid for placement by influencers.

**Figure 38: Travel influencer @goanniewhere’s Instagram post is sponsored by two brands. She uses ‘#sponsored’ at the end of her list of hashtags in a compliant way**



Source: @goanniewhere’s Instagram feed<sup>74</sup>

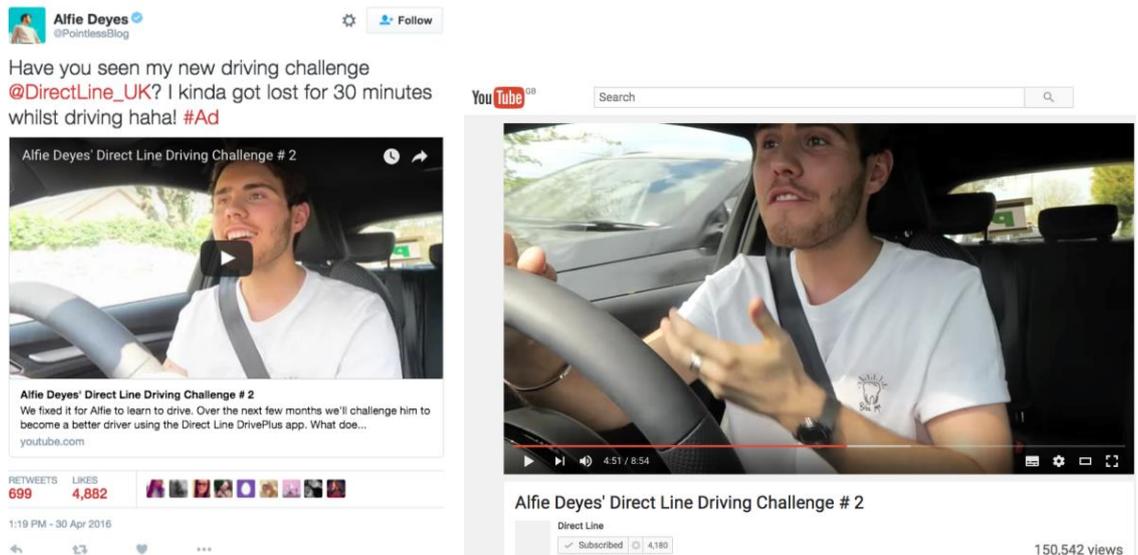
**Figure 39: Italian TikTok creator Martina Picardi dancing in her Lolway Shoes in this sponsored TikTok video. She uses the #sponsored hashtag in a compliant way**



Source: Martina Picardi (@Picardimartina)’s TikTok feed

<sup>74</sup> <https://www.instagram.com/p/B0Qi0WuBCPM/>

**Figure 40: Creator Alfie Deyes, tweeting an embedded video and link to his safe driver challenge. The video is hosted on insurance company Direct Line’s YouTube channel. He successfully uses #ad to highlight the commercial partnership**

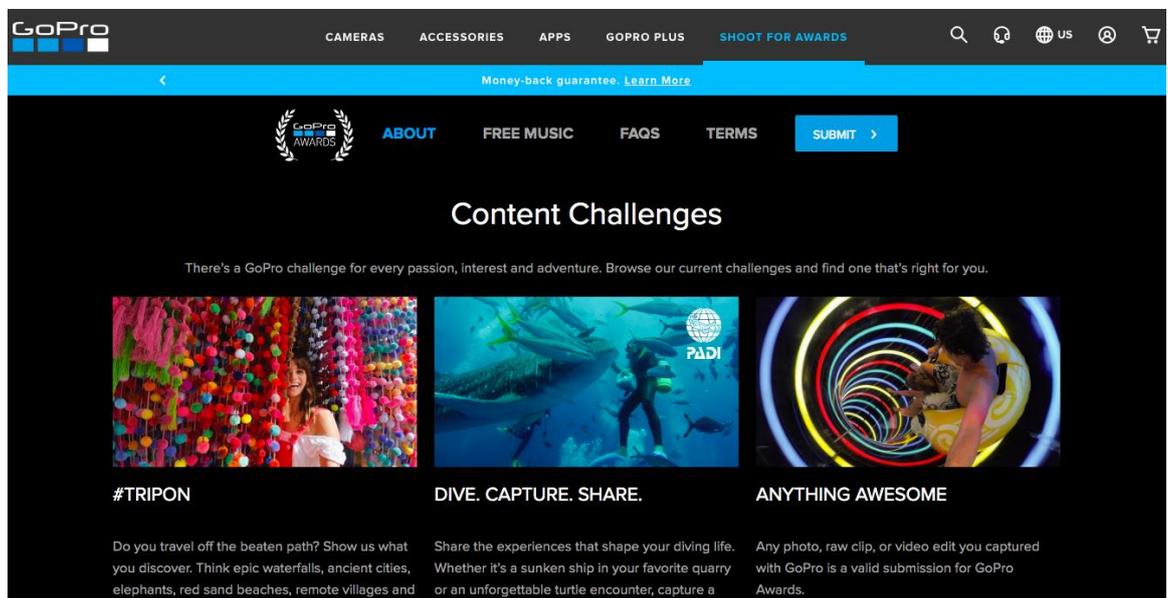


Source: Twitter<sup>75</sup> / YouTube<sup>76</sup>

- **User-generated content (UGC).** Ensure the brands is explicit about the permissions it is seeking, licensing and how UGC will be used.

GoPro awards millions of dollars every year to people submitting their videos and photos using GoPro to its popular GoPro awards. It ensures that its terms and conditions are clear, and that users understand the licensing and give their explicit permission to GoPro to use their uploaded content.

**Figure 41: GoPro’s popular and well-run Photo and Video of the Day awards**



<sup>75</sup> <https://twitter.com/alfiedeyes>

<sup>76</sup> <https://www.youtube.com/user/DirectLineTV/>



Source: GoPro.com<sup>77</sup> / Instagram<sup>78</sup> / Facebook<sup>79</sup>

<sup>77</sup> <https://gopro.com/en/us/awards>

<sup>78</sup> <https://www.instagram.com/GoPro/>

<sup>79</sup> <https://www.facebook.com/GoProUnitedKingdom/>

# 8. Measurement

There is the very real danger of option paralysis when measuring social media. The sheer amount of data that is available from the platforms for organic and paid advertising can be overwhelming. As the number of social platforms increases and alternative metrics are created for newer content formats and ad formats, this problem is only going to get worse.

This means that there is a requirement to tie social media platforms, content and campaigns to specific social media objectives that can be linked back to organisational objectives.

The days of generating social media follows, likes and engagement without focusing on more robust outcome measures are well behind us. While some businesses with ecommerce objectives for social media may see likes and followers as not much more than vanity metrics, other brands and organisations, who do not sell direct to consumer or perhaps who are trying to drive behaviour change, may view these metrics as a strong indicator of campaign or post success.

There is no one-size-fits-all approach to measurement. Consider what success looks like for every department and individual. Identify shared visions of success and define how each team and department measures this. Because different organisations now use social media for very different things (customer service, sales generation, stakeholder management, relationship management, recruitment, product/policy/service development, communications, marketing, and so on), the criteria to measure will be different as well.

## Why don't we have standard social media measurements across all social platforms?

“All of the social channels have evolved (to a certain degree) independent of one another; and certainly in competition with one another. So, the myriad interactions you can perform are branded to differentiate from their competitive set. Great for marketers, less so for simplified measurement. That said, to an extent we do have some consistency, most platforms count the really basic stuff like likes, bookmarks, shares, favourites, comments etc. – obviously with the proviso of only counting what they offer. This question is really getting at the issues to do with what counts as a view and how do we accurately measure audience reach?”

“It's a known issue about which the marketing directors of both Procter and Gamble and Unilever have both read the riot act to the online measurement suppliers. This hopefully will create a tipping point where they must come together and really work out a consistent way of measuring this kind of stuff. But up until recently it has been in the platform's vested interests to overinflate their own measurement numbers.

“In terms of measuring the value of social media, we need to think carefully about what we mean by the word value. Value is subjective and depends on what it is that an organisation is trying to achieve with its social activity. Measuring value in social, as always, will depend on this and can't be shown as a single number of necessarily with a £/\$/€ sign in front of it.

“You prove value by demonstrating that the planned and pre-agreed objective has been achieved. This is usually some form of outtake (typically awareness shift) or outcome (typically a positive activity change), and these metrics needs to be blended with the content metrics that the social platforms can provide.”

— Richard Bagnall, Chairman of global communications evaluation trade association AMEC  
Alison Spray, Director of Data and Insights at Hill & Knowlton (AMEC Board Member)

## 8.1 What are you measuring? Identifying goals, objectives and KPIs

The starting point for any measurement framework is to establish clear objectives and then to work out what data will help demonstrate when/whether the business has achieved them. Defining clear objectives is at the heart of good measurement because it helps focus the whole organisation on what is, and what is not, useful and relevant.

It is impossible to create a one-size-fits-all social media dashboard or report that will suit everyone. But it is both possible and desirable to agree on a framework around which anyone can measure and evaluate any social media activity or campaign.

One of the most useful ways to create clear objectives is to ensure that they are SMART, where the desired outcomes are:

- Specific
- Measurable
- Achievable
- Realistic
- Time-related.

Using this SMART framework makes it much easier to translate the contribution of social media activity to the organisation's objectives. Example objectives could be:

- Number of website visits driven by X social media campaign in Q1
- Number/value of sales over a set time period, driven by or influenced by the social media campaign
- An X% increase in completed customer surveys in X sector via WCA (website custom audiences) and retargeting Facebook ads in Q3
- An X% uplift in specific brand metrics among the X audience in 2019.

Measuring value in social will take place across the funnel and cannot necessarily be shown as a single number with a £/\$/€ sign in front of it. Demonstrating SMART objectives have been achieved can prove value. This is usually some form of outtake (typically awareness shift) that can lead to an outcome (typically a positive activity or behaviour change).

## 8.2 Measuring offline conversions

Methods of measuring success can range from brand tracking, noting increases in volume and quality of social media comments, key message association through to monitoring trackable behaviours and actions, such as watching a webinar, downloading a piece of research, reading a case study or completing an enquiry form.

Occasionally, the value or conversion event may take place offline such as with the visit of pop up shop or a call to sales contact to arrange a meeting.

Many organisations are working towards creating proxy models to track the impact and value of multiple marketing, communications and sales touchpoints. Some of these offline conversions may be impossible to tag but all should be possible to track, especially if they have an impact on a conversion event. This invariably includes additional research, such as asking questions about the conversion event and analysing responses, e.g. "How did you hear about us?" or "What made you decide to...?" at the point of offline conversion.

Earned media via recommendations, word of mouth, social, broadcast media (radio, TV) or earned print media coverage are just some of traditional channels whose value and impact is felt by organisations and may be modelled but not easily tagged.

Organisations who track, for example, the impact of speaking at a conference or mentions by influential social media creators on the number and quality of sales or 'conversion events' (e.g. donations to a charity) over a defined period will find the process of matching social content and engagement relatively easy to map.

## 8.3 Metrics for social media

The author was a co-founder of a collective movement called Measurement Camp in 2008, which tried to create standards in social media. We did not succeed.

We came to realise very quickly that:

1. Organisations were using social media for different purposes; some for brand awareness and reach, others for aiding the sales cycle, to support their customer service or to communicate and engage on policy, and some to encourage behavioural change.
2. There was a lot of mismatching social media data from the platforms – it was impossible to measure whether a retweet on Twitter was worth more or less than a share on Facebook (and the question was fundamentally flawed anyhow).
3. Too many organisations were choosing their monitoring and measurement tools (free or commercial) before setting their measurement and reporting objectives.
4. Marketers and PR professionals were relatively happy with the metrics that were easy to measure (outputs), but less keen on those that were useful but hard to measure (outtakes and outcomes), as social media was almost wholly organic at that time and so resource and budgets were not under scrutiny.
5. There was a lot of 'snake oil' and overstating the importance of social media from technology vendors and agencies in an immature marketplace.
6. Old media and traditional forms of earned media, e.g. media PR coverage, were using historical measurements such as RAJAR (Radio Joint Audience Research) and BARB (Broadcasters Audience Research Board), so finding a good model was difficult.
7. Social traffic was not usually a click-and-convert process, and the value of social media in the decision-making process needed to be modelled effectively alongside other elements of the marketing, communications and servicing mix.
8. We were never going to be able to get the full picture of the impact of social media as it was almost impossible to track everything.

The truth is that, although measuring social media and its impact is more straightforward than it was in 2008, many small- to medium-sized organisations still struggle in this area.

The secret is to focus on the brand's purpose or "north star", define clear objectives, define success with measurable KPIs related to those objectives and remember why the business is doing social media.

## Top tips: What do you measure and how?

“The measuring bit is relatively easy. There’s plenty of ways to measure social media. How is social contributing to our business? That’s the only thing that’s really worth measuring in my opinion.

“We measure pretty much everything, including traffic and lead generation and conversions. We’ve moved well beyond analysis of the most basic metrics, to the extent that we’re modelling lead generation, as well as brand metrics actively on social.

“We have a range of internal customer service/experience KPIs – including speed of resolution and escalation – we track and report to make regular improvements.”

— Head of Digital, B2B

“What we measure depends on the objectives of the campaign, for example;

- Awareness: Reach, impressions, video views, video retention rates
- Engagement: Link clicks, replies, hashtag use
- Revenue: Link clicks, sales.”

— Anna Rawcliffe, Digital Manager, Social and Engagement, National Trust

“We don’t own a direct sale and rely on third party retailers to complete the commercial transaction with our consumers. This makes our job harder to prove ROI as we can’t show a completed sale. We focus a lot on intent to purchase and measure this through clicks to retail and the associated cost per click.

“We also use standard social engagement or applause metrics such as likes, shares and comments as well as virality rates. From an acquisition standpoint we pay attention to organic and paid audience growth rates and cost per acquisition when running paid acquisition activity.

“We increasingly run detailed surveys of our social audiences in order to build a clearer understanding of motivations and behaviours within each community as well as Net Promoter Scores and capturing anecdotal feedback. This helps us relate audience profiles back to our publishing so we can be more focused on what books and authors will resonate more effectively.

“Anecdotal feedback from our communities on social often tells a story better than any metric. After all it is the genuine reaction of someone to our books or activity. We share anecdotal feedback widely including our favourite posts of the week, most surprising interaction of the week and examples of going above-and-beyond on customer service. These tend to create the most reaction and debate internally and help to move on perceptions of audiences and their behaviours on our different social platforms.”

— Albert Hogan, Director, Group Marketing, Audience & Digital Development, Penguin Random House

“Aside from obvious conversions and sales measures, I pay close attention to profile views and website clicks. I also keep a close eye on my audience as one of my key aims is for my audience to get slightly younger.”

— Florence Adepoju, Founder, MDMflow

## 8.4 Using campaign tracking

There are many Econsultancy blog posts, guides and training courses that cover analytics and attribution, from basic through to advanced techniques. Some examples include [How ecommerce marketers can get started with attribution](#), [The State of Marketing Attribution 2017](#) report and [Fast Track: Advanced Data & Analytics Training Course](#).

Campaign tracking allows the organisation to create posts in social media that can be tracked and attributed towards a conversion goal that takes place on an owned digital platform, such as a website, for example, a purchase, downloading a whitepaper, subscribing to a newsletter or filling in a sales contact form.

Any social media platform where 'conversions' has been set as an advertising campaign objective will also ask for a pixel to be added to the company website. This is tracking code that can be connected to conversion goals and can be given an attribution window suitable to the organisation's specific conversion goals.

For simplicity and to highlight the process, here is a simple approach to campaign tagging and tracking using Google Analytics:

1. **First, create a goal in Google Analytics** that will keep track of how many leads are converting via social media.
2. **Establish a URL destination goal.** The URL destination should be the final page that a user sees if the goal has been successfully achieved (such as a thank you page after a user signs up for a webinar).
3. **Use UTM parameters** within the links for inclusion in social media posts. This is the best way to track and organise traffic from social media. UTM parameters are personalised tags that are added to URLs to help Google Analytics categorise referral traffic.
4. **Use Google URL builder** to add the custom parameters to URLs. There are suggestions to help when tagging links for social media. Remember, use the URL builder to create URLs for different channels, such as email or PPC, to help measure and optimise the impact of different channels and paid, owned or earned activity.

Using Google's URL builder can help measure to what extent social media is having an impact on conversions on a website. When users click one of the custom links, the unique parameters are sent to the organisation's Google Analytics account, which marketers can review to identify the URLs that are most effective.

- **Source:** 'Facebook', 'Twitter', 'LinkedIn' or whichever social channel the link is being used on.
- **Medium:** 'post' for non-paid content and 'ad' or 'sponsored' for all ads (to help differentiate between organic and paid social traffic).
- **Campaign term:** Ignore this when creating UTM parameters for social media content.
- **Campaign content:** This field can be used to differentiate between variations of social media ads and for A/B testing content. It can also be used to tag content within a series of posts that belong to the same campaign. For example, if the business is running a marketing campaign in social media that consists of five different posts, this field can be used to indicate which post each link pertains to, such as 'post-1' or 'post-2'.
- **Campaign:** This is where it pays to get specific. Ensure that campaign names are not too general like 'facebook-posts'. Instead, create campaign names that ensure it is possible to understand which marketing campaigns traffic and leads are coming from, such as 'XYZ Event sign ups Dec 2019'.

**Figure 42: Google's campaign URL Builder**

## Campaign URL Builder

This tool allows you to easily add campaign parameters to URLs so you can track Custom Campaigns in Google Analytics.

Enter the website URL and campaign information

Fill out the required fields (marked with \*) in the form below, and once complete the full campaign URL will be generated for you. Note: the generated URL is automatically updated as you make changes.

\* Website URL   
The full website URL (e.g. <https://www.example.com>)

\* Campaign Source   
The referrer (e.g. [google](#), [newsletter](#))

Campaign Medium   
Marketing medium (e.g. [cpc](#), [banner](#), [email](#))

Campaign Name   
Product, promo code, or slogan (e.g. [spring\\_sale](#))

Campaign Term   
Identify the paid keywords

Campaign Content   
Use to differentiate ads

Source: *Google Analytics Demos & Tools*<sup>80</sup>

Use these social media tags in organic and paid elements of the organisation's campaigns. Link shorteners such as bit.ly or ow.ly can make links look cleaner and will not affect the ability to track.

Within Google Analytics look at Acquisition > Campaigns to see a detailed report on how each campaign is performing, including traffic, visitor behaviour and goal conversions. It is also possible to drill down into data on the performance of each channel. Remember to A/B test to determine exactly which variables have an impact on clicks and conversions.

Marketers have increasingly come to understand that reach, sentiment and engagement metrics in social media are not enough. Showing how social media drives conversions is critical to truly demonstrating value, winning over sceptical executives and ensuring that it continues to be a core element of the digital mix.

Conversions differ from organisation to organisation but broadly they could include:

1. A user signing up to volunteer for a local charity
2. A new individual to a membership organisation
3. A potential new customer signing up for an introductory skincare sample
4. A smoker signing up to pledge a smoke-free month
5. An existing motor insurance customer renewing their insurance policy and buying home or pet insurance at the same time
6. A member of the public reading information about an organisation's corporate social responsibility impact on their neighbourhood

It is challenging, but not impossible, to measure and attribute social's impact on conversions relatively accurately, especially if the business is able to measure those conversions on a website with an analytics package behind it.

<sup>80</sup> <https://ga-dev-tools.appspot.com/campaign-url-builder/>

## 8.5 The attribution challenge and dark social

The impact of social media can be undervalued, especially when social conversions get misattributed and the credit goes to direct or search marketing efforts. The connection between social posts and downstream conversions needs to be made. This section will discuss the steps marketers must make to track social conversions.

When it comes to developing the right approaches to attribution, it is still early days, but social platforms are helping by improving their insights and analytics, and this includes conversion tracking.

Platforms such as Facebook/Instagram, LinkedIn, Pinterest and Twitter realised they need to help marketers understand whether social advertisements are driving conversions and to prove that spending money on advertising on their platforms actually works. They offer their own conversion pixels – tracking codes that can be connected to conversion goals and can be given an attribution window suitable to your specific conversion goals.

To track the impact of social share buttons on the company website, consider writing a code that modifies the URL that gets shared. It may require a bit of hacking by developer, but it is possible to add a unique parameter to those links.

Again, add the modified social share links to the company's conversion goals in web analytics to track the impact that social sharing buttons has on conversions.

### Dark social

Dark social is an important concept to understand as it creates difficulty in accurately assessing the value of social media on traffic and conversions on a website.

Not to be confused with unpublished or dark posts in paid social campaigns, where the post is only seen by those targeted with an ad, dark social refers to the activity associated with any untrackable brand mentions and any traffic from social media that is not attributable to a known source and is usually classified direct or 'unknown' referral traffic to a website.

It is almost untrackable from a marketer's perspective and social listening tools are also unable to derive sentiment or useful research information such as purchase intent data from it.

Sources of dark social can include:

- URLs copied and pasted into messaging apps, such as WeChat, WhatsApp, Facebook Messenger or texts
- Email
- Secure browsing (HTTPS).

A study by RadiumOne<sup>81</sup> highlighted the impact of dark social on measurement. According to the study, around 84% of all global social shares are 'dark'.

There are a couple of ways marketers can start understand and model the impact and value of dark social, although these are not completely infallible.

Firstly, marketers can set up segments in analytics tools such as Adobe or Google Analytics. Creating unique referral traffic segments and viewing metrics from these can give helpful indication of the volume of dark social traffic. However, there are no guarantees that all of this traffic can be classified as dark social visitors.

The second method is basic correlation analysis. Marketers can analyse social media campaigns when they are getting the most web traffic, analyse how much can be tracked from paid and organic social

<sup>81</sup> <https://radiumone.com/wp-content/uploads/2016/09/RadiumOne-Dark-Social-White-Paper.pdf>

activity with trackable links and by process of deduction, what percentage left could be classified as via dark social. Through this analysis, marketers can identify the average dark social traffic per campaign.

Another method is to create a standalone dark social campaign. Brands such as ASOS and Adidas work with grassroots influencers and WhatsApp groups to deliver messaging and content for dissemination via messaging platforms. Ongoing tracking of the traffic and conversions from campaigns such as this will have given them a good understanding of the impact of untrackable links on campaign conversion objectives and therefore, the value of dark social.

## 8.6 A framework for putting it all together

Currently no tool can work across all of the channels and customise metrics against tailored objectives, so the use of a framework becomes a necessity.

Four years after Measurement Camp disbanded, a framework for measuring social media was launched by the International Association for the Measurement and Evaluation of Communications (AMEC). It was endorsed by a number of communications bodies and the UK government.

The framework was designed to be flexible and to work across different communications scenarios and channels. Social as a standalone framework was absorbed into wider channels and platforms. The framework covers paid, earned, owned and shared media and multiple communications objectives, including lead generation to brand building, campaigning to lobbying.

It is now being widely adopted and adapted by organisations of many sizes and across many sectors, as it provides a consistent, credible and meaningful way to measure paid, owned and earned activity. More importantly, it focuses on providing a framework that encourages a move away from output metrics (likes, follows, number of posts etc.), preferring to tie measurement to planned objectives based around outtakes and outcomes.

The framework can be applied to integrated campaigns, channels or platforms and across paid, owned and earned social media activity. It can also be adapted for customer experience and service.

### Do you use/recommend dashboards or other ways of reporting and visualising social analytics?

“No, not a commercial dashboard. The key is to use the dashboard that is right for you and your organisation.

“All dashboards have varying strengths and weaknesses. Dashboards are great for live monitoring, for example, during a product launch or an issue. Beyond that they struggle to provide the detail or insights that really matter, especially for non-data people. For that, offline reports with more than just quantitative figures are key – they offer the space to provide recommendations on how to evolve strategy.

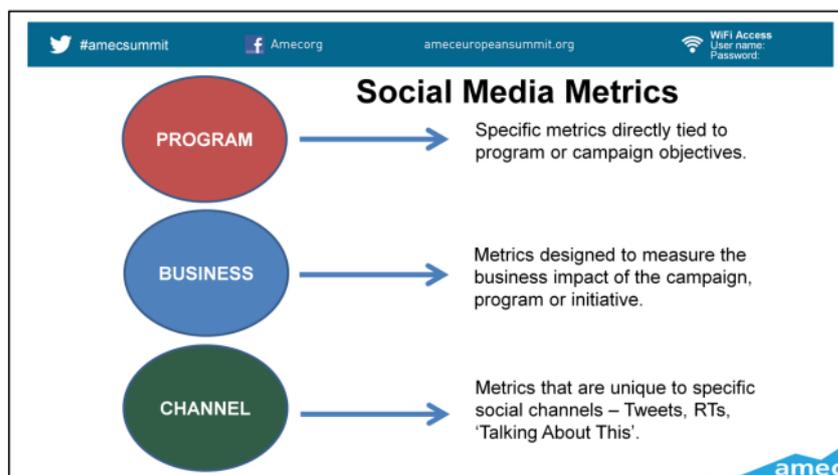
“To do this, begin with the end in mind. What was the outcome that you were trying to deliver? What were the pre-agreed targets? How did the strategy map to that? What outputs did the activity generate? How did this affect the target audiences? What shifts in awareness occurred? And what then happened as a result?

“AMEC’s integrated evaluation framework guides organisations of all sizes through exactly this process and there are a number of best practice examples of campaign and social media measurement on [www.amecorg.com](http://www.amecorg.com).”

— Richard Bagnall, Chairman of global communications evaluation trade association AMEC  
Alison Spray, Director of Data and Insights at Hill & Knowlton (AMEC Board Member)

AMEC developed the social media measurement framework as it believed there was too much emphasis on channel metrics (where the data is easiest to get) and this was not connected effectively back to business impact metrics.

**Figure 43: AMEC’s social media measurement framework**



Source: AMEC

The framework, with some example metrics filled in here, was tracking campaign or programme metrics (i.e. those directly tied to social media programme or campaign objectives), ongoing channel-specific metrics (metrics that are unique to specific social channels – tweets, retweets, followers for Twitter, likes, pins and repins for Pinterest etc.), and business metrics, which are used to show the business impact of the campaign or initiative.

**Figure 44: AMEC’s social media measurement framework (with metrics)**

The AMEC Social Media Valid Framework (with Metrics)					
	EXPOSURE	ENGAGEMENT	INFLUENCE	IMPACT	ADVOCACY
<b>PROGRAM METRICS</b>	Total OTS for program content	Number of interactions with content Interaction rate Hashtag usage	Increase % association with key attributes Change in issue sentiment	New subscribers Referral traffic to website White paper downloads	Recommendation/ Total Mentions %
<b>CHANNEL METRICS</b>	Number of items Mentions Reach Impressions CPM	Post Likes Comments Shares Views RTs/1000 Followers	Net promoter % by channel	Unique visitors to website referred from each channel	Organic posts by advocates Ratings/Reviews
<b>BUSINESS METRICS</b>			Purchase consideration % Likelihood to recommend % Association with brand attributes	Sales Repeat sales Purchase frequency Cost savings Number leads	Employee ambassadors Brand fans/advocates

Source: AMEC

The AMEC framework is something that both large and small organisations can use, as it offers rigour in measurement and reporting. Regardless of which framework the business uses for measuring social media, marketers will need to consider how to report their results.

## 8.7 Reporting and user-based reports

Different internal audiences may require different reports or dashboards. Social media platforms provide so much data that the key to reporting well is focusing each stakeholder on just the pieces of data that are relevant to helping them do their jobs.

It is good practice to segment the stakeholder groups who are being reported to, and to tailor the type of metrics and the frequency of reporting being provided to them.

An operational social media team working with social media every day requires a huge volume and depth of data to monitor changes – both large and small – that can have a significant impact on the success of their activity (e.g. the impact of landscape photos/videos vs. square photos and vertical photos through to significant platform algorithm changes).

Typically, product, marketing and customer service teams do not need such detailed metrics or reporting; they mostly need data focused on brand impact, sentiment and perception changes, purchases, leads and how social media is performing in an omnichannel service environment.

C-level executives focusing on the impact of social media on business performance (and reputational consequences arising from social media activity) will need data focusing on bottom-line ROI and efficiencies.

Those with access to social and connected data who are tasked with collating and analysing it from different sources should agree a reporting focus, top-line metrics and the frequency of reporting to different stakeholders.

Econsultancy recommends that marketers consider focus/frequency for reporting by completing a table similar to the one below.

**Table 5: Example of a top line metrics and reporting frequency table**

Role	Focus for reporting	Example metrics that matter	Example frequency
<b>Social Media Manager</b>	Comms	Reach	Daily
<b>Community Manager</b>	Brand	Community Health	per campaign
	Sales	Sentiment	
	ROI	Outcomes (e.g. conversions, donations, sign ups etc.)	
<b>Marketing manager</b>	Brand	Awareness	Weekly
		Brand metrics (awareness, sentiment, purchase intent etc.)	Monthly
		Share of voice	Per campaign
<b>C-suite</b>	Financial	Sales	Quarterly
		ROAS	Annually
		Customer Lifetime Value	

Source: Michelle Goodall

Again, it may feel like a large undertaking for social media teams of one that have other responsibilities, but understanding that not everyone needs the same granularity of data that helps the team do its job well is a light bulb moment for many.

It means that the social media team can focus on reports that have meaning for the brand's intended audiences and can free itself up to report on the 'so what' and the 'now what' parts of reporting. Simply put, that is answering: what does this mean for the organisation? And what have we learned/what do we do with this information?

## 8.8 Social media dashboards

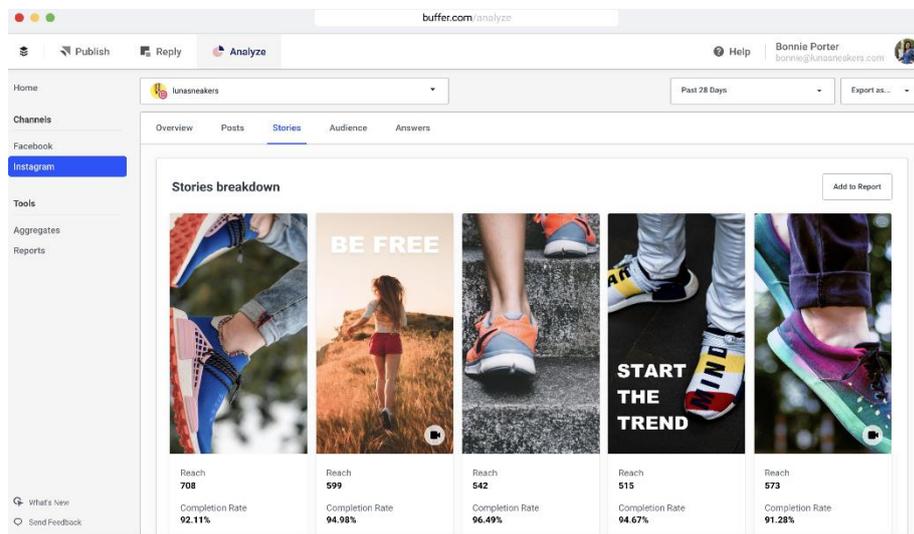
While some are a little critical of the ‘out of the box’ dashboards and reports that social analytics tools provide, for many, they can offer quick and increasingly sophisticated ways to visualise important data and trends in managed social media channels.

All of the tools have their weaknesses and strengths.

At one end of the scale, enterprise monitoring tools can provide features such as impressive social data dashboards, which are fully customisable and can be made visible across corporate headquarters, marketing departments and boardrooms on digital screens or mobile devices. These customisable dashboards allow social media to be seen beyond the command centre in organisations and let the wider organisation view share of voice, brand sentiment, campaign success and other trackable comments/events such as purchase signals.

At the other end of the scale, entry level tools like Buffer or Sprout Social allow marketers to download simple visual PDFs of their key social media channel data (follower demographics, growth, keyword volume, etc.) or to export as a CSV for further analysis or more sophisticated charting.

**Figure 45: Buffer’s Analyze Tool enables simple creation of customised social media reports**

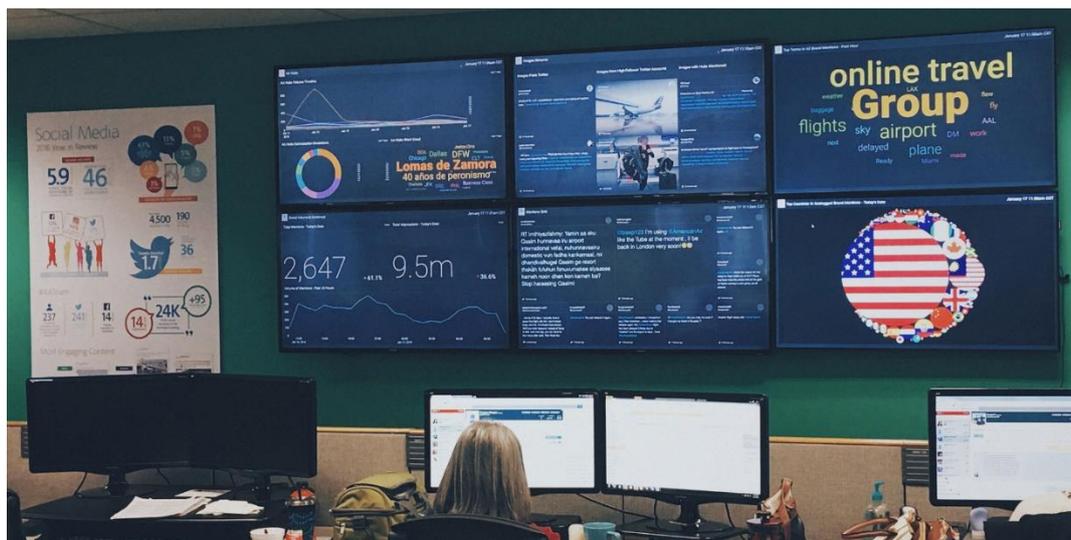


Source: Buffer<sup>82</sup>

Sophisticated visualisation tools like Brandwatch’s Vizia allow organisations to create real-time digital displays of social media and connected data sources for a number of different situations – including boardroom environments and dedicated customer service operational environments.

<sup>82</sup> <https://buffer.com/analyze>

**Figure 46: Brandwatch Vizia visualises social media listening at American Airlines Command Center**



Source: Brandwatch<sup>83</sup>

<sup>83</sup> <https://www.brandwatch.com/case-studies/american-airlines/>

## Dos and don'ts when measuring social media

“Do – Start at the beginning. Ensure that any work you do is clearly aligned to the objectives of your organisation.

“Do – Plan what you want to achieve in terms of outcomes that matter to your organisation and not just outputs.

“Do – Set clear and meaningful targets and KPIs ahead of commencing your work.

“Do – Sit down with your boss/client/peers and agree what specific, measurable, achievable, relevant, and time-bound (SMART) targets would define a successful outcome.

“Do – Define and understand your target audiences and use the appropriate channels at the appropriate times of the day to reach them.

“Do – Resist the urge to rely on purely a Software as a Service (SAAS) monitoring and analytics platform to measure your activity. Understand your objectives, set your targets and measure appropriately.

“Do – Question the charts and the measurement that you are given. Ask yourself why the information matters. Then ask yourself why again. If you can't come up with a good reason, you're measuring the wrong stuff.

“Do – Use the data to tell the story to your organisation of your work. What were you trying to achieve? Why? What was the need? What did you do? What worked? What didn't work? Why not? What have you learned and what will you do differently next time?

“Do – Spend time with your data analysing it and interpreting it. What are the nuggets of information that it is telling you? Measurement needs human interpretation to draw out the insights. Insights are not charts. Remember Nate Silver's great quote: 'We ask too much of technology and not enough of ourselves.'

“Don't – Fear failure. Measurement is not about only showing where you have succeeded. Use it and embrace it. Used appropriately good measurement provides information that can be fed into the planning process and will help make your work more effective.

“Don't – Forget that measurement needs context and baselines. Do benchmark analysis, understand the environment in which you and your competitors are operating.”

— *Richard Bagnall, Chairman of global communications evaluation trade association AMEC*  
*Alison Spray, Director of Data and Insights at Hill & Knowlton (AMEC Board Member)*

# 9. Conclusion

The purpose of this guide is to ensure that organisations fully understand the scope, opportunities, risks and the required investment of time, effort and budget to create a sustainable and effective social media strategy.

As social media matures and audiences' expectations and use of these distinctly different platforms evolves, organisations must adapt and focus on best practice and excellence to achieve their organisational goals.

Please read this guide in conjunction with the following complementary social media guides:

- [Social Media Platforms Overview](#)
- [Social Media Advertising Best Practice Guide](#)
- [B2B Social Media Best Practice Guide](#)

A list of key takeaways is as follows:

- **Align and support other departments**  
It is critical that marketers align effectively with other teams and to increase impact and minimise reputational risk in social media. Align and support other departments and teams to ensure that content and communities reflect a consistent brand and brand message.
- **Be customer-centric**  
Embed context and relevance into meeting the 'customer' at various points in their journey. Adapt content and messaging appropriately to 'nudge and nurture'. Bear in mind that with the possible exception of data-driven, sequential social media ads, social media is not linear.
- **Use data to target audiences effectively**  
Platforms are offering increasingly sophisticated ways of reaching target audiences. Compliant first-party data, website custom audience, lookalike data and retargeting can help organisations reach their audiences efficiently at any stage of the customer journey.
- **Be prepared to invest in quality content...**  
Do not underestimate the resource, budget, skills development, technology and specialist support required to create quality content and experiences in social media.
- **... and social media advertising**  
The days of organic-only posts are long gone. Platform algorithms will continue to change and relying on organic reach places a limit on the marketing, communications and sales objectives an organisation can achieve. Organisations must invest in social media advertising.
- **Formalise a content and content marketing strategy**  
This is fundamental to improving social media planning and effectiveness.
- **Be mobile and visual**  
Create quality visual and video content that is optimal for mobile consumption. Both the platforms (algorithmically) and users (attention and action) will reward organisations for this approach. Consider your emoji policy for posts and the impact that visual, emoji-laden user posts has on your social media research and analytics.
- **Be prepared for the very worst to happen**  
Effective crisis and issues management processes must support any social media strategy. Stress test processes and people.
- **Do not let social tools dictate strategy or what the business measures**

Consider how social media tools (e.g. social analysis/research/advocacy tools) can help other internal stakeholders and teams before investing. It is rare to see any effective social media strategy relying on free tools.

- **Understand that social media data cannot replace qualitative market research**

Research specialists recognise the need to not overstate the importance of social data, especially when specific audiences and platform data cannot be tracked. Social data is an important part of qualitative and quantitative marketing research, but does not replace traditional qualitative research approaches.

- **Keep learning**

Social media is a rapidly evolving area of digital. Stay up to date with changes to user expectations, platforms, content, advertising, data usage and technology by investing in skills development and ongoing learning. Econsultancy's training, online learning, research and guides are our recommended accessible, up-to-date resources.

# 10. Further Reading

Econsultancy Social Media Statistics

<https://econsultancy.com/reports/social-media-statistics/>

Econsultancy Social Media Best Practice Guide Bundle

<https://econsultancy.com/reports/social-media-bundle/>

Econsultancy Social Media Advertising Best Practice Guide

<https://econsultancy.com/reports/social-media-advertising/>

Econsultancy B2B Social Media Best Practice Guide

<https://econsultancy.com/reports/b2b-social-media-best-practice-guide/>

Econsultancy A Marketer's Guide to the General Data Protection Regulation (GDPR)

<https://econsultancy.com/reports/a-marketer-s-guide-to-the-general-data-protection-regulation-gdpr/>

Facebook News

<https://newsroom.fb.com/news/>

Instagram Blog

<https://business.instagram.com/blog?>

Twitter Blog

<https://blog.twitter.com/>

Pinterest Blog

<https://business.pinterest.com/en-gb/blog>

Snapchat Blog

<https://forbusiness.snapchat.com/blog>

TikTok Blog

<https://newsroom.tiktok.com/en-gb/>



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