



Build a Social Media Customer Acquisition & Retention Powerhouse

USING DIRECT MARKETING FUNDAMENTALS TO LEAD THE
CHARGE

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Contents

- Introduction 3
- The Problem with Social Media in Today’s Customer Acquisition & Retention Efforts 5
 - Social Media is a Mystery to Many 5
 - Lack of In-Depth Audience Insight 5
 - Millennials and Generation Z vary on their usage of social media..... 5
 - Summary 5
- The 5 Pillars of Direct Marketing 7
- The Importance of Research 12
 - The Importance of Data for Segmentation & Personas..... 12
 - Social Listening: Why?..... 14
 - Social Media Listening: How? 14
 - What to listen for? 14
 - Identifying and Understanding Your Competition..... 15
 - Tools for Listening..... 15
- Some Real Social Media Examples..... 17
 - Facebook for Customer Acquisition and Retention Efforts 17
 - LinkedIn for Customer Acquisition and Retention Efforts 18
 - Twitter for Customer Acquisition and Retention..... 20
- Staffing, Training and Social Media Policy 23
 - Leveraging Internal Resources 23
 - Training, Management, Development..... 24
- Measuring Performance and Reporting on Success 25
- CONCLUSION..... 26
- About DWS Associates 27
- About the Authors: 27
 - Dudley Stevenson 27
 - Pat McGraw 27

This may sound like heresy in some circles, but social media marketing might not be all that effective.

At least not the way most brands are going about it.¹

¹ Downloaded from <https://www.linkedin.com/pulse/myth-social-media-scott-monty?trk=prof-post> on 2/12/2016

Introduction

Social media is still a mystery to many businesses – but if your business plans on targeting Millennials and Generation Z, you need to solve the mystery and turn social media into a highly productive tool for your new customer acquisition and retention efforts.

By 2030, Millennials will grow to 78 million in the U.S.² And Generation Z, those born in the late 1990's, are projected to grow to close to 80 million, according to the US Census.³

And their reliance on social media is going to have a significant impact on how you communicate with them.

As reported by Media Insight in “How Millennials Get News: Inside the Habits of America’s First Digital Generation”, “...social networks are exposing Millennials to more news than they were initially seeking. Overall, just 47 percent who use Facebook say that getting news is a main motivation for visiting, but it has become one of the significant activities they engage in once they are there. Fully 88 percent of Millennials get news from Facebook regularly, for instance, and more than half of them do so daily.”⁴

And as for Generation Z, they are “...immersed in social media, relying on it for socializing and also for school, with 52 percent using social media for typical research assignments, and around one-third working with classmates and watching lessons online, according to Sparks & Honey's data.”⁵

That same report goes on to state “As Generation Z's influence inevitably grows, marketers will be forced to adapt to engage this audience in new ways. For instance, those who are 19 and younger prefer social networks like Snapchat, Secret and Whisper, as a quarter of 13- to 17-year-olds have left Facebook this year, stated Sparks & Honey. Marketers who are ahead of the game are adapting already.”

The challenge you face is getting ahead of the curve – and the competition – when it comes to utilizing social media for more than ‘soft metrics’ such as ‘Likes’ and ‘Follows’ and ‘Downloads’, and shifting your activities to produce harder, more meaningful metrics such as ‘leads’, ‘marketing qualified lead’, ‘sales qualified lead’ to ‘demonstration’ to ‘trial’ and ‘purchase’.

This report lays out a simple plan for utilizing the best practices of direct marketing and how they can turn your new customer acquisition and retention efforts via social media into a powerhouse.

² Downloaded from <http://www.statista.com/statistics/281697/us-population-by-generation/> on February 22, 2016

³ Downloaded from <http://www.forbes.com/sites/lauraheller/2015/08/14/move-over-millennials-generation-z-is-in-charge/#6b3635ce48d7> on February 22 2016.

⁴ Downloaded from <http://www.mediainsight.org/PDFs/Millennials/Millennials%20Report%20FINAL.pdf> on February 22, 2016.

⁵ Downloaded from <http://www.adweek.com/news/advertising-branding/gen-z-infographic-can-help-marketers-get-wise-future-159642> on February 22, 2016.



“According to Wikipedia, there are 211 social media platforms – so participating in all of them is fairly unlikely.”⁶

“The report found that 27 percent of millennials use Facebook less than once a week, and 11 percent don’t even have an account. Additionally, 54 percent don’t have a Snapchat account, and 39 percent aren’t on Twitter.”⁷

⁶ Downloaded from <https://www.google.com/webhp?sourceid=chrome-instant&ion=1&espv=2&ie=UTF-8#q=how%20many%20social%20media%20platforms%20are%20there> on February 20th, 2016

⁷ Downloaded from <https://contently.com/strategist/2015/09/24/study-not-all-millennials-use-social-media-the-same-way/> on February 22, 2016.



The Problem with Social Media in Today's Customer Acquisition & Retention Efforts

Social Media is a Mystery to Many

Today, most organizations have mastered the ability to create a presence and push content through social media platforms – but they struggle with measuring the impact on key metrics such as leads generated, leads converted, closed sales, conversion of one-time buyers to multi buyers, and customer retention. They also struggle to effectively deliver the right message and offer to the right person at the right time through the right communication channel in order to motivate the right result.

The typical social media effort remains focused on public relations and building awareness through Likes, Followers, Retweets, Posts etc. – or pushing out enough 'content' to support someone's case for "...look at all the work we do..." as if quantity is more important than results.

Lack of In-Depth Audience Insight

Many organizations treat all potential customers the same – as members of one large group of people that are only differentiated by basic high level factors such as demographics, firmographics or geography.

But few are addressing key factors that can have a huge impact on qualifying inquiries, prioritizing them for the nurturing process, messaging and offers, communication channel mix and more. The result is virtually the same messages and offers are being sent out by businesses to all prospective customers – just switching out the product of interest and a list of features for that product – along with the "Buy Now" offer that is less meaningful and effective with those closer to the 'top of the funnel'.

Millennials and Generation Z vary on their usage of social media.

"According to the data, millennial women are more likely to skip signing up for Snapchat and Twitter, while millennial men are more likely to forgo Facebook and Pinterest."⁸

What does this mean?

Well, beyond the cute answer offered up by the author of that article, which was that you better think about how you present the social buttons on your site and in your communications – you better start thinking about what messages and offers you use.

Summary

Lack of in-depth audience insight leads to communication plans that treat all inquiries and customers the same – serving up virtually the same messages and offers to all across all communication channels including social media leads to the wrong message being sent.

And when your audience is using social media so differently, the impact of the wrong message when sent via social media is intensified.

And the lack of social media staff while 'staffing up' on SEO and SEM (PPC) and email turns social media efforts into a secondary focus when it means so much more to the audience you are targeting. In essence you are ignoring your audience's preferences and attempting to communicate with them through less effective and desirable channels.

⁸ Downloaded from <https://contently.com/strategist/2015/09/24/study-not-all-millennials-use-social-media-the-same-way/> on February 22, 2016.



“Direct marketing is an interactive system of marketing which uses one or more advertising media to effect a measurable response and/or transaction at any location.”⁹

Social media is “...websites and applications that enable users to create and share content or to participate in social networking.”¹⁰

⁹ Dudley Stevenson, [Marketing Direct: Breaking Through the Clutter](#), DWSA Publishing, August 20 2015, page 5.

¹⁰ Downloaded from <https://www.google.com/webhp?sourceid=chrome-instant&ion=1&espv=2&ie=UTF-8#q=define+social+media> on February 22, 2016



The 5 Pillars of Direct Marketing

As our founder, Dudley Stevenson, wrote in his most recent book, "[Marketing Direct: Breaking Through the Clutter](#)", the five pillars of direct marketing are:

- Targeting
- Offer
- Format
- Creative
- Timing

Targeting. Of all the 5 pillars, targeting is about 7 times as important as the other factors. You need to know your audience – and you need to know them beyond basic demographics and firmographics. You need to understand psychographics and geographic factors including wants, needs, expectations, perceptions, the person’s role in the buying process, and their decision making process and media usage habits.

You need to create segments so you can more effectively deliver the right message and offer to the right person at the right time via the right communication channel in order to motivate them to take the right action. And to be effective at this, you need to have clearly defined “starts” and “ends” to those stages in the decision making process so that you can shift from providing basic product and company information to specific solution features and benefits to the prospect to request for sales meeting to request for demonstration to price quote to closing of transaction. Depending on whether you are selling consumers or business, you need to not only identify the person’s role in the buying process, but also the actual steps in the sales/buying process. The following lists give an example of the roles and steps in the buying process that might occur in a B2B transaction.

For example, the roles in the buying process might be defined as:

- Initiator
- Influencer Internal
- Influencer External
- User
- Gatekeeper
- Decider
- Final Authority
- Buyer

And, the steps in the sales/buying process might be defined as:

1. Lead generation
2. Information gathering
3. Marketing qualification of lead
4. Sales qualification of lead
5. Sales identification/qualification of the opportunity
6. Strategizing/covering basics
7. Presentation of concept
8. Proof of concept



9. Demonstration
10. Close/obtain signed paperwork
11. Fulfillment/implementation
12. Post-sales support
13. Follow-up for new opportunities

The number of people and the roles they occupy and the steps in the sales/buying process will change by industry and type of sale (consumer vs. business) and you will need to clearly define these for your business/industry model. Once you have that information, you can layout the stages in the decision making process as they should occur for your business/industry model. And, once you have developed a picture of the roles and stages in the sales/buying process, you will need to develop a persona (profile) of each type of person that occupies that role. For example, the information gathers might cover several generations, such as Millennials and Baby Boomers and ideally, you would need to develop a communications persona for each.

| | | | | | | | | |
|-----------|-----------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|
| Product A | Persona A | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels |
| | | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers |
| | Persona B | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels |
| | | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers |
| | Persona C | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels |
| | | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers |
| Product B | Persona A | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels |
| | | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers |
| | Persona B | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels |
| | | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers |
| | Persona C | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels | Preferred Channels |
| | | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers | Messages/Offers |

Figure 1: Segmentation by Decision Stage Decision Chart

For a more detailed visual, Figure 1 offers an example of what you need to consider when targeting – the segment, the decision making stage as well as what communication channels are preferred by that segment at that point in the process and relevant messages and offers.



| | |
|----------------|--|
| Persona Name | Daddy Driver |
| Demographics | 40 to 45 year old, married, male, Caucasian, college educated - graduate degree in business/finance, 2 children under 18 living in the home, owns home valued at \$500,000 to \$749,999, HH Income \$175,000 to \$200,000, Vice President in financial services industry |
| Geographics | Southwest US: Arizona |
| Psychographics | Active, outdoorsman that hikes, camps, avid golfer and cyclist, watches Game of Thrones, reads fiction 6 to 12 books per year |
| Needs | Fuel Economy, Safety, Style that reflects successful professional career; prefers gathering information and buying online rather than visiting dealers |
| Challenges | Having the time to gather information, compare and contrast as well as visiting various dealers to see/test drive |
| Internet Usage | Smartphone, Tablet and Laptop computer used for business and personal. Uses mobile devices for email, texting, phone/Skype, social media and gathering information (search, download content, view videos); Entertainment/Personal: Pandora, ESPN App on mobile devices |
| Current Auto | Ford Escape 3 to 5 years old |
| Considering | Ford Escape Hybrid, Toyota Highlander, Ford Flex, Honda CR-V |
| Quote | I do the driving for the family and use the vehicle for business (client meetings and entertaining) so I want safety, style, smart features, room and fuel economy. |
| Television | ESPN, Financial News Network/Bloomberg, HBO |
| Radio | Local Talk Radio (Drive Time) |
| Newspaper | Local Daily Paper (Arizona Republic) and Wall Street Journal |
| Magazines | Reads Financial Magazines: Kiplinger's, Bloomberg Business, The Economist |
| Smartphone | Phone calls (business and personal), text (personal), email (business and personal), apps (airline, hotel, rental car) |
| Social Media | Facebook (Family and Friends, News, Information Gathering), LinkedIn (Business only), Twitter (Family, Friends, Social more than Business), No other social media used |

Figure 2: Examples of Personas for 2 Segments of Prospective Customers

And Figure 2 offers you an example of what the segment, also known as persona, would include so you can get a better understanding of the depth needed.



| | |
|---|--|
| Persona Name | Tommy Technology |
| Product(s) of Interest | Sales and Marketing Technology (CRM, Marketing Automation, Website/ecommerce) |
| Demographics | 35 to 45-years of age, male, White/Non-Hispanic, Married, 2 children under 18 living in the home, HH Income \$100,000 to \$125,000, own home(\$500,000 to \$749,999 value) |
| Geographic | US: New England: Suburban |
| Psychographics | Running, hiking, belongs to a gym and works out 3 to 5 times per week, reads books on financial planning and investing, watches college and professional sports (football and basketball), watches DIY programs on HGTV |
| Education | Bachelors Degree: Information Technology |
| Career Path | Hired out of college by current employer and has moved up the ladder with regular promotions in current company |
| Job Title and Role | Director, Information Systems |
| Reporting Structure | Reports to VP/CIO |
| How Performance is Measure | Speed and effectiveness - how quickly he solves issues/user support requests |
| Typical Day | 80% of the day is spent supporting/solving user issues, 10% is spent on related paperwork/reporting, 10% is spent on training (self development or staff development) |
| Greatest Challenges | Wants to pursue cutting edge technology to make business more digital but is not the final decision maker; struggles with being seen as less experienced due to having no experience outside current employer |
| Definition of 'success' | Getting his vision implemented which requires newest technology drive sales, marketing, and back-end operations |
| How they learn new skills and keep current | Training provided by the manufacturer of technology used by company; webinars and white papers collected from tech companies whose products he admires; professional networking |
| Associations and networks they participate in | Association of Information Technology Professionals (AITP), LinkedIn Groups (Information Technology Professional, Global Information Technology Professionals) |
| How they prefer to interact with vendors | Emails that share information that helps him stay current, and phone/video calls when involved in researching new technology. Prefers not to meet face to face until closer to the decision time. |
| Where they turn to for information | Online-manufacturers site for documentation, FAQs, Knowledgebase and Forums. |
| Overview of recent purchase | Focused on gathering information and briefing VP/CIO and other key groups (Users, Finance), acted as point of contact and scheduled presentations and demonstrations of short list vendors selected by VP/CIO and Finance and Users, participated in presentations and demonstrations and was able to share insights/opinions but did not have a vote in the final selection |

Figure 3: B2B Persona



Offer. Once you have this in-depth understanding of who, why, what etc., you can focus in on the appropriate offers to extend across the decision making process. Let's be honest – “Buy Now” is the ultimate goal but you might have more luck with [ex] “Download this checklist that will help you select the most appropriate product for your needs” or “Register for the free online webinar” in those earlier stages when they are still gathering information.

When it comes to how this works within social media, imagine you have a prospect in the “” stage – your message on Facebook might be “Reminder: Sign up for Product Demonstrations and Trials Now!”

For a loyal business customer a LinkedIn Group sponsored by the product manager the message might be a direct message from the product manager via the LinkedIn Group with “Click here for an early preview of our soon to be released upgrade”.

Format. Is a tweet with an image appropriate and effective at this time – or is a personal in-mail sent by the LinkedIn Group admin to individual group members the better route. Is text best or video or audio?

Creative. The presentation of the message- the design, colors, fonts, images and actual content or presentation of the message. The copy – be it in print or audio – is key, whereas the presentation is more of a secondary element. However both should be tested in order to improve performance.

Timing. Should you rely on Facebook during the holiday season when your target audience/segment is spending less time on Facebook and more time out and about with the family? Do you post between midnight and 6 am, Monday through Friday or during traditional work hours (8 am to 5 pm)? Are your tweets more impactful evenings or weekends?

There will be some audiences and messages that are best shared across the right social media platform at certain times and days – and others that aren't. This is another critical factor to constantly test, measure and analyze in order to improve performance.



The Importance of Research



Based on what we covered in the previous section, especially under “Targeting”, you understand the importance of research.

What you want to know is do your audiences use social media and if so, how and why. What information are they

searching for, what problems/challenges are they trying to solve, what opportunities they are seeking to turn into a reality. And you need to include a strong offer that motivates them to take the next step with you – be it view webinar, visit your booth at a trade show, request a demonstration, or issue an RFP.

Again, as we mentioned earlier, what you will most likely discover is what our research has uncovered – some don't use social media at all. Some use it strictly for personal reasons such as staying in contact with family and friends – and they would not at all welcome any intrusion by your business. And some that use it for anything and everything and would welcome information about your business if it's relevant to them at that time.

The Importance of Data for Segmentation & Personas

The first step is to begin identifying your segments and personas – and that requires some data, data appending and data analysis.

As we wrote in “[Targeting and Segmentation](#)”, “If Direct Marketing is the focusing of resources on the superior opportunity then targeting is the activity which identifies the superior opportunity. In other words, targeting is the technique used to locate the prospects that are most likely to want to buy from you.”¹¹

The first data source is your organization’s customer/prospect database. Starting with your current customer data, identify those that are ‘most successful’ in a specific time frame, for example, the past 24 months. You control the definition of “most successful’ but we would suggest you include data points such as:

- How recently did they buy from you?
- How frequently do they buy from you?
- How much have they spent with you?
- What payment method do they use?
- Do they return products?
- Do they utilize customer service/tech support?

¹¹ Dudley Stevenson, [Targeting and Segmentation](#), self-published, 2016, p.2.



- Have they referred other clients to you?

Rank the customers based on these factors/data points, so that your ‘most successful’ customers are those that score in the top 20-25%.

When targeting consumers, we recommend you work with a firm such as Claritas (PRIZM) or Neustar (ElementOne). They can append data to your customer records in order to help you identify segments which will provide you with a tremendous amount of insight including:

- Total size of universe
- Location (household level)
- Psychographic data including media preferences/usage

This information is just the first step to understanding who your ‘best customer’ is, how many are there, where they are and how you can attract more of them to your business.

When targeting businesses, we recommend working with such firms as Experian , Hoovers, and Dun & Bradstreet in order to look at firmographics such as

- Industry
- Revenue
- Employees

Then we recommend market research to develop personas. That might require interviews and surveys to understand the following for “Information Gatherers”, “Influencers”, “Users”, “Buyers” and others involved in the buying process at a business.

- Personal demographics
- Education
- Career path
- Job Role and title
- Reporting structure
- How their job/performance is measured
- The personal benefits that they would derive from the purchase of the product/service
- What a typical day looks like
- What skills are required to perform the job
- Their greatest challenges
- Their definition of ‘success’
- How they learn new skills and stay current
- What they read
- What associations and networks do they participate in
- How do they prefer to interact with vendors
- Where do they turn to in order to gather information*
- Overview of a recent purchase

* This is where you want to get into all sources they use – for what reasons and at what points in their decision making/purchasing cycle. Specifically, when it comes to social media as about the details –



because it's not enough to know that they have a Facebook account, you need to know how they use it and if they use it to help with their job.

Social Listening: Why?

For many, "sit back and listen" is unacceptable. They want to get out there and make things happen. Some might even want to 'test the waters' but most just want to make things happen.

We get that.

But we recommend listening, learning, confirming and adjusting before you take the next step for two reasons. And since this is an on-going activity so you can stay on top of changes in behavior as well as changes in technology, you will be constantly listening, learning and analyzing, conforming and adjusting with your testing processes.

First, the volume of data is overwhelming – and you need to figure out how to figure out how to manage it so it can drive your actions. And you also don't need to jump in and make a very public mistake based on inexperience so make the time to listen and learn.

Make sense?

Oh and most importantly, this part of the ongoing research you need to continuously perform in order to succeed over the long-term because things change and you need to pay constant attention to what's happening so you can identify changes and be able to respond faster and more appropriately.

Social Media Listening: How?

First, let's make sure we're talking the same talk – because there is a difference between social monitoring and social listening, and what we want to do is social listening.

"Monitoring takes a scrape and dump approach, which can be helpful for collecting any and every mention. Listening takes a reflect-and-analyze approach, helping to notice patterns and insights, things like sentiment (how do people feel when they talk about me?) and channels (where are the conversations happening?)."¹²

So why listening?

Because listening will "...spark new conversations, gain valuable audience insight, identify advocates or influencers, build affinity for your brand, or find customer support and sales opportunities in real-time."¹³

You need that level of detail to be effective.

What to listen for?

Use branded and non-branded keywords and then sift through the data in order to get an understanding of what people are using those terms for in their social media posts/conversations.

¹² Downloaded from <https://blog.bufferapp.com/social-listening> on February 17, 2016

¹³ Downloaded from <https://blog.bufferapp.com/social-listening> on February 17, 2016



- Your Company’s Name
- Your Product Name(s)
- Topics that relate to your business
 - Product category (marketing automation software or men’s clothing)
 - Other (For example, ‘auto safety’ when targeting car buyers)
- Competition (more on that in a bit)

In addition to the actual buyers of your products/services, you also want to listen to key influencers – for example, people that work for or with your competitors or cover your industry. So as you listen to what you capture with your keywords, look at who is most active in those areas and has the most active followers – then add those individuals to your list to follow and listen.

You want to hear the good, the bad and the ugly so you get a clear (as clear as possible) understanding of what is going on in social media, as it applies to your business and products as well as your audiences.

Why? Because this helps you identify opportunities, set realistic objectives and devise the strategies and tactics you need to be successful.

Identifying and Understanding Your Competition

As mentioned earlier, while you are watching, listening and learning about your audiences, do that for your competition as well. Watch them. Listen to them. Learn from them.

Also get a feel for their operations – personnel and other resources such as the technology they use is key. How many people? What experience do they have? Strengths and weaknesses? Habits?

Here’s why this is important.

Beyond helping you plan ways to be uniquely valuable in social media for your audiences, this insight will help you internally when [ex] someone makes the comment that “...I saw what they did, how come we don’t do that..”

Tools for Listening

Here are a list of social media listening tools that you might wish to use. Obviously you will want to use the best tool for your specific needs – and remember that technology is changing at an incredible rate so some of what follows may be dated.

[Google Alerts](#) is a content change detection and notification service, offered by the search engine company Google. The service sends emails to the user when it finds new results—such as web pages, newspaper articles, blogs, or scientific research—that match the user's search term(s).

[TweetDeck](#) is a social media dashboard application for management of Twitter accounts. You can monitor keywords, [hashtags](#) and set up lists to monitor influential people.

Twitter will also email you regarding whenever someone likes your Tweet, if you’re mentioned in a Tweet you liked, whenever your Tweets are retweeted and more. To see all the options, click [here](#).

[Hootsuite](#) is a social media management system for brand management and the system’s user interface takes the form of a dashboard, and supports social network integrations for Twitter, Facebook, LinkedIn, Google+, Foursquare, MySpace, WordPress, TrendSpottr and Mixi



Mention is a social media tool that monitors the web, including the major social media channels, to keep you informed every time somebody mentions your name, brand or target keywords

Sysomos mines and analyzes content from social media or user-generated content to create a picture of media coverage.

Visible Technologies - The Visible Intelligence (VI) enterprise social media intelligence platform provides three core capabilities: social media monitoring, enriched data analytics and insights, and customer engagement. (Note: Visible Technologies was acquired by Cision and Vocus in September 2014.)

Salesforce Radian6 is a social listening tool that is dedicated to listen, analyze and engage information being shared publicly online. Radian6 is an online tool under the Salesforce brand



Some Real Social Media Examples

Facebook for Customer Acquisition and Retention Efforts

Facebook offers you several ways to leverage the “social” platform in addition to all the wonderful advertising options – so let’s focus on the social aspects.

Pages versus Groups

“Pages allow real organizations, businesses, celebrities and brands to communicate broadly with people who like them. Pages may only be created and managed by official representatives.

Groups provide a space for people to communicate about shared interests. Groups can be created by anyone.”¹⁴

The most common course of action is to set up a Page. Pages, for awareness and lead generation (aka the ‘top of the funnel’) seem to make the most sense. You would want to consider creating Pages for the company and product(s). The content shared here would best be focused on building awareness in order to get your business and product(s) into the consideration set of potential customers – and into the top of mind for key influencers.

Obviously a concern with Pages is organic reach – the average reach for posts from Facebook Pages. Facebook is, after all, in business to generate a profit and it is their playground so they have set the rules – and the set them up to encourage you to spend money on advertising versus getting everything you ever wanted for free.

“In March organic reach was 2.6 percent, slipping to 2.27 percent for pages with more than 1 million likes, according to the latest research from social analytics and reporting firm Locowise.”¹⁵

You should check out “[Business Manager](#)” which will allow you to “... securely share and control access to their ad accounts, Pages, and other assets on Facebook. “

Also check out “[Audience Optimization](#)” which “...is an organic targeting tool to help publishers reach and engage their audience on Facebook and better understand the interests of people clicking on their posts.”

Both will help you better manage your Facebook Page(s) and see improved results.

So, what about Groups?

Facebook Groups make it easy to connect with specific sets of people, like family, teammates or coworkers. Groups are dedicated spaces where you can share updates, photos or documents and

¹⁴ Downloaded from <https://www.facebook.com/help/162866443847527/> on 2/17/2016.

¹⁵ Downloaded from <http://www.adweek.com/socialtimes/locowise-march-2015/619104> on February 17, 2016



message other group members. You can also select one of three privacy options for each group you create.¹⁶

Because Groups are set up and designed for people with a shared interest, this might be an option for “Customer using Product A” and you can use the Group to share information with potential and current customers using Product A.

In groups, members receive notifications by default when any member posts in the group. Group members can participate in chats, upload photos to shared albums, collaborate on group docs and invite members who are friends to group events.¹⁷

We suggest that Groups may be a more appropriate option for current customers and clients, and Pages may be more appropriate for generating awareness and interest with potential customers.

Recommendations for Facebook

Create Pages and Groups based on the varied interests of your audiences. The basics would be official Pages for the company, and product(s). Use Pages for generating awareness and attracting potentially new customers, use Groups for communicating with current customers since you can control who is accepted into Groups.

Promote the Pages and Groups in all communications to the appropriate audiences. To get your Page Followers and Group membership going – make sure you include your efforts and invite the right people through [ex] emails to prospects, customers, media, industry analysts etc. Create Facebook Page Updates that mention your LinkedIn presence – and vice versa.

Consistent Flow of Relevant Information to the Audience(s) through Pages, Groups and Updates. This is all about the content marketing plan within your overall marketing plan. What content will you create for what audience and how will you distribute it across all relevant channels including the social media platforms?

Include relevant offers that require them to share contact information that feeds into your CRM. Invite your Facebook Page followers and Group members to go to a landing page, submit a form and download a white paper or view a video. And make sure it’s trackable so the contact information and the offer/campaign is captured as the individual’s initial source or campaign code.

Manage and Monitor Your Presences. If you have the resources/budget, the ideal situation would be to assign a person to each Facebook Page and Group so that Posts/Responses can be monitored and conversations can move forward at an acceptable pace. And prepare them for getting conversations moving – for example, if the schedule calls for content on Subject A next week in your company’s Facebook Page, sit down with the person responsible for the Page and discuss how they can stimulate and facilitate dialogue.

LinkedIn for Customer Acquisition and Retention Efforts

With LinkedIn, your options include Pulse, which is part of the Education Channel, and allows you to publish articles/posts, LinkedIn Groups and creating your own “Company Page”.

¹⁶ Downloaded from <https://www.facebook.com/help/162866443847527/> on March 7, 2016.

¹⁷ Downloaded from <https://www.facebook.com/help/162866443847527/> on March 7, 2016.



The Pulse/Education Channel would be an effective way for employees to show their expertise and build awareness for your company and product(s). For example, “How to Select the Right X for your needs” written by a subject matter expert from your company would most likely be a popular topic with potential customers.

“Company Page” allows you to create a Page for [ex] the business or product(s), specific products offered. The benefits of having a “Company Page” include

- Showcases your business and product(s)
- Shows visitors how their network/connections are associated with your organization
- Highlight customers
- Customer information that includes how many are on LinkedIn and the industries that they work in and their employers.
- Targeted status updates*

* Targeted status updates allow you to select who is notified of your latest post. You are able to select based on a number of factors and the update will appear on their homepage. Best of all, after 24-hours you can review impression and engagement metrics in order to gauge your impact and effectiveness. To learn more, [click here](#).

Hint: Make sure your prospective, current and former customers along with staff know about the Page and have them connect with it. This allows you to tap into their networks.

LinkedIn Groups offers you the opportunity to address prospective customers, current customers’ staff, industry experts...well, the list goes on. More importantly, LinkedIn Groups provide you with the opportunity to create an online community around a topic of shared interest.

“LinkedIn Groups provide a place for professionals in the same industry or with similar interests to share content, find answers, post and view jobs, make business contacts, and establish themselves as industry experts.”¹⁸

Imagine, if you would, a LinkedIn Group entitled “Financial Services Experts sponsored by Intuit”. And the Group is focused on providing “...people with a strong interest in financial planning a place to learn, develop, network and build a deeper understanding that will help them achieve their goals.”

The Group happens to be managed by members of Intuit employees - product marketing team –. They have reached out and invited leaders in the financial services industry (subject matter experts and leading employers), industry analysts (subject matter experts), members of professional associations serving the financial services sector, , customers of the Intuit products

If you decide to start a LinkedIn Group, be sure to check out the [Group Moderator Community](#) which focuses on helping Group leaders effectively manage, engage and nurture your own LinkedIn Group(s).

¹⁸ Downloaded from https://help.linkedin.com/app/answers/detail/a_id/1164/~/groups---getting-started on February 17th, 2016.



And, working with the marketing/content marketing team, they have come up with a calendar of topics that will be addressed for the next 12 months. Some of it might even be tied to the product features and updates so that customers and other members of the group can explore the topic together and customers can come back to the classroom with unique perspectives and a deeper understanding of the topic.

Oh, and prospective customers would join the Group one of two ways – by searching for the topic because it interests them or by invitation when they first contact the organization and express an interest in the product/service.

The team that is administering the Group would be able to reach out to individual members and address their questions about your organization, products and services. They would be able to reach out to customers and help with service and support. The Group is a perfect environment for networking with industry peers and customers. Plus there are opportunities here to leverage the expertise and build something unique into your marketing programs! (Imagine a program that allows customers to work with Group members from R&D that’s involved developing a new product or product features to enhance an existing product.)

Twitter for Customer Acquisition and Retention

Twitter is strong at reaching a large audience interested in a specific topic, and it’s strong at 1:1 conversations. Both are invaluable to acquisition (reach) and retention (personal).

Broadcasting is ideal for top of the funnel activities – building awareness and generating initial inquiries. For this, use Twitter to share/distribute specific content relevant to specific, identifiable groups – which is where hashtags (#) come into play. While listening to Twitter, identify the hashtags that are relevant for your company and product(s) then, as part of your marketing communications plan, identify what content you will share via Twitter targeting which groups and hashtags. Test to see what works but based on experience you would want to tweet several times a day, and your tweets should feature a good mix of self-promotion, topics that are relevant to your audience, and photos/video.

For example, Samsung uses product specific hashtags - #SamsungGalaxyS7 –to share information and offers with those interested in that specific product. However, they could use #smartphone for information and offers that are broader based than a single product.



And if the individual doesn’t purchase your product but continues to follow your tweets, they might become a “raving fan” that shares the information from your Tweets online and offline, leading others to purchase your products!



On the B2B front, IBM uses hashtags such as #Cloud to address business buyers searching for cloud solutions.

Once you motivate someone to Follow you, incorporate into the messaging, information that will motivate them to explore other channels of information – be it other social media platforms or on your web site or even in person!

Twitter for retention is based on listening and being there (with an account) to quickly, accurately, appropriately respond to complaints and other comments. This, of course, can be a 'hot seat' where training and expertise in crisis management and communications comes in extremely handy – as does a clear process for responding and escalation.

From a proactive communication perspective, Twitter could be used as a broadcast system – product safety announcements, recalls, urgent product updates, event updates, special promotions, etc. Dell Computers has successfully used Twitter to promote and clear out millions of dollars of excess inventory. For those in the acquisition stage, it's a way to be involved and part of the community, for those in the retention stage it can be an important factor in understanding why customers are a loyal or considering switching to your competitor.



In fact, a Go-Gulf infographic showed the majority of social media teams are fewer than four people.

According to a survey conducted by Altimeter, corporate social media teams have on average 11 members. This includes businesses with more than 1,000 employees.¹⁹

¹⁹ Downloaded from <http://sproutsocial.com/insights/social-media-team/> on February 17, 2016.



Staffing, Training and Social Media Policy

Earlier in this document, we briefly addressed staffing with a promise to come back to the topic in more detail – well, we’re back for a deeper dive into this important topic.

There seems to be two rules of thumb when it comes to staffing for social media. The first, popular with those with social media in their title, prefers dedicated personnel in specific titles and roles such as:

- Social Media Manager who owns the social media initiative, sets goals and reports to senior leadership
- Community Managers who are the face and voice of your brand, out there on the front lines engaging with influencers, answering questions and dealing with service issues.
- Social Strategists who measure and analyze the work, making suggestions for improving performance.
- Editors are responsible for production schedules and deadlines, style guides and ensuring the content is high quality.
- Content Creators write the blog posts, white papers, e-books, Facebook updates and maybe even Tweets. They record audio and shoot video.
- Content Producers handle the technical side of producing content such as editing photos, videos so that they can be uploaded/installed and function properly on the various platforms.

Based on these pieces of information, the challenge is that [a] your chances of hiring this many people dedicated to just social media are slim at best, and [b] the dedicated social media staff approach can create silos within sales, marketing and customer service/support that weaken the overall performance.

And as mentioned earlier, social media is part of the integrated marketing communication effort so it must be part of not a stand-alone.

What do we recommend? As you layout your integrated marketing communications plan, you are most likely going to need to have positions that must address offline and online, including social media. The challenge will be finding people with the expertise in all these areas – so you might be better off investing in the training and development of your staff so they can become more knowledgeable in social media.

Leveraging Internal Resources

The marketing team might not get the staff it needs – so they can go out to the appropriate departments and recruit the people with the expertise needed from across the organization.

For example, look to product managers, service agents and possibly even customers to play the role of “community manager” on Facebook, LinkedIn and Twitter. Make them the face and voice of the brand, engaging with influencers and answering questions.

The challenge will be finding those that want to become involved and have the skills needed but the reality is that no marketing/ /retention team is going to be able to do all of this on their own. So it’s either an organization-wide initiative or something the organization can pass on due to the lack of perceived value.



Training, Management, Development

You will need to develop and execute a process for identifying talent, cultivating it and overseeing it. How to develop a successful process for training and developing internal talent over time varies but here are some recommendations for your consideration.

The social media policy is defines what staff and any employee of the organization is allowed to do on Social Media, with respect to the business. It's a code of conduct and they are necessary because they protect the business in the event that an employee posts something damaging. Social media policies also protect the employees by providing guidance about what is allowed and considered proper and acceptable behavior.

You want your social media policy to empower your employees to post content and interact on behalf of the business because having that many advocates is incredibly important to your success in social media.

There has been a great deal of discussion concerning employees' personal use of social media – which it is wise to address the subject in your policy. [This article](#) shares some examples of how companies such as Adidas, Best Buy, HP, Gap and The Los Angeles Times are addressing this issue.

For examples, check out the [Social Media Governance website](#).



Measuring Performance and Reporting on Success

Beyond the typical social media metrics such as Followers, Likes, Posts, Shares, Retweets etc., it is important to tie specific actions back to specific key metrics such as inquiries, marketing qualified leads, sales qualified leads, opportunities, first time customers, repeat purchases, customer retention and referrals.

So how should you accomplish this?

The key is going to be a process that allows you to capture the right data into your technology such as your CRM. For example, when it comes to acquisition on any of the three social media platforms mentioned earlier, you will have communications that offer potential customers something of value and require them to click a link, land on our landing page, submit a form with contact information in order to receive the offer.

That campaign would be properly coded so that all submitted forms were captured into your CRM as a new lead from the appropriate social media platform

As for retention, you may need to create process that includes capturing information into your CRM. For example, while monitoring Twitter, you identify a customer that is in need of assistance. Following your process, the appropriate member of your Twitter team reaches out to the individual (Direct Tweet) and gathers data in order to offer the right solutions – part of that would be name, customer ID etc. At that point your Twitter team member identifies the individual in the CRM, opens an incident and enters the proper information.

Once the issue has been solved and closed, you can Direct Tweet them a link to a survey so you can get their input regarding the experience.



CONCLUSION

Social media offers you a great many opportunities – but if you don't go about it the right way, you can invest a great many resources without seeing any positive return on your effort.

Remember to incorporate social media into the overall marketing/acquisition/retention effort rather than leave it as a stand-alone entity – you will be able to leverage resources more effectively and deliver an experience for your audience(s) that is much more unique and valuable. And that leads to more customers, purchases, referrals and happier employees!

Social media is more than the marketing team – you need to leverage expertise from across the company. That means you may encounter a great deal of “...I have enough on my plate as it is...” but over time, as positive results pile up, you will see greater interest and support.

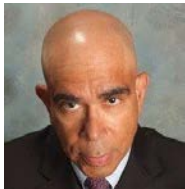


About DWS Associates

Founded in 1982, DWS Associates is a full service marketing firm that develops and implements multi-channel marketing programs for organizations targeting business-to-consumer and business-to-business audiences in global markets. Our focus is on data-driven, innovative lead generation, lead nurturing, retention, and referral programs that attract, engage and retain profitable customers. Our staff is highly experienced in market research, competitive intelligence, business intelligence and analytics, strategic planning and campaign management - so we help you increase sales and marketing performance while building strong, unique, differentiated brands.

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Dudley Stevenson, founder and CEO of DWS Associates, has over thirty-five years' experience in consumer marketing, business-to-business marketing, and direct marketing, including developing, planning, and implementing go-to-market strategies. He's also the author of "[Marketing Direct: Breaking Through The Clutter.](#)" Working with organizations ranging from start-ups to Fortune 100 companies, he and his team have helped clients such as IBM, SAS Institute, Sony, Neiman Marcus, Arizona Highways, Marshall Field & Co., Mrs. Field's, UNICEF, SSA Global Technologies, Hartmarx, and Patagonia implement successful direct marketing programs. A longtime member of the Direct Marketing Association and the American Marketing Association, Stevenson is also a sought-after speaker. He's given hundreds of presentations and workshops on marketing and direct marketing. His "Marketing Planning 101" workshop alone has reached more than sixty thousand marketing and sales professionals.

Pat McGraw

For more than 25-years, Pat has been developing and leading integrated multi-channel direct marketing campaigns targeting B2B and B2C audiences for non-profit and for-profit organizations in education, technology, retail and other industries.



Drawing upon his experience in market research, competitive intelligence, data analytics and strategic planning, Pat identifies opportunities for success - new audiences to pursue, new markets to enter, new programs, products and services to develop and launch, pricing strategies, etc. And with his operational experience, Pat launches and manages integrated campaigns (acquisition and retention campaigns that attract, convert and retain customers more effectively for businesses, and lead generation and retention campaigns for tech firms, retailers and service firms). The results include lowering the cost to attract a new customer, increasing retention rates and more.

Pat has worked with a variety of businesses across a wide array of industries – ranging from small privately held firms to industry leaders such as IBM, Microsoft, Sears, Kmart, Grainger, Bermuda Department of Tourism, Travelers, AutoNation USA and others.



Outside of education, Pat has worked with leading corporations and service firms including Microsoft, IBM, Sears, Kmart, Insight, Barry Blau & Partners (currently Havas Worldwide) and more.

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