



An Oracle Best Practice Guide
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Best Practices for Getting Started with Social Media

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Introduction

Companies today are getting closer than ever to customers, even collaborating with them to solve problems. There is immense opportunity for organizations in the social Web. By removing communication barriers between an organization and its consumers, the social Web makes it possible to maintain small-scale, one-on-one customer relationships against the backdrop of large-scale efficiency and growth. It is the resulting combination of creativity, collaboration, and community with more-staid business principles that captures the imagination of so many business leaders today.

Using social media successfully requires a sound strategy and methodical approach that makes social media an integral part of your business. The social media experience needs to be held accountable for results, governed by policies and guidelines, optimized for efficiency, and built into the fabric of business processes and systems. This guide is intended for the organization that recognizes the importance of engaging consumers through the social Web but needs help looking beyond the hype to a sustainable social media strategy that produces real value to the business.

Customers are shaping your brand every moment. These best practices will help ensure that the effects are positive.

The Social Media Challenge

The social media shift calls for a new mindset in the relationship between organization and consumer—a mindset characterized by transparency and accountability, employee empowerment and spontaneity. From an operational or legal standpoint, that new mindset can seem too risky or impractical, outweighing any potential benefits. It is this perception of disproportionate risk that prevents many organizations from acting.

The good news is that social media–related operational issues and risks can be managed just like those of any other business initiative. The key is to ignore the hype, which implies that a sound social media strategy involves creating a Facebook fan page, sending out hourly tweets, or running a large-scale viral marketing campaign. Instead, approach your social media strategy with a holistic plan that accounts for every part of the business, sets realistic expectations, and provides a long-term view of success.

Best Practices: A Five-Step Approach to Social Media

It can be tempting to jump straight into your social media game plan without a lot of preparation. Many of the social Web technologies are free (or, at least, cheap) and easy to use. There are plenty of case studies to emulate. And it's exciting to try something new. But you should tread carefully as you launch new social media initiatives—there is groundwork to be done first.

In this guide, you'll learn the five main steps to establish a social media strategy:



Figure 1. Oracle recommends five steps to establish a social media strategy.

These steps are heavily weighted toward operationalizing social interactions between you and your consumers. Integrating social media with day-to-day operations is the only way to optimize the long-term value of your social media initiatives while subjecting them to the same rigors around efficiency and risk management that you apply to the rest of your business.

Our recommendations are based on the fundamental belief that a social media strategy requires a people-centered approach, rather than a technology-centered one. And people are dynamic things, so be prepared to act and iterate, continually assessing your approach and making course adjustments as you go.

Step 1: Understand Your Organization

If there's one thing to be learned from the social Web, it is the importance of authenticity. You have to communicate with consumers in a human voice, letting employees express their personalities, relinquishing some control over corporate messaging, and acknowledging your mistakes. But you can't be authentic if you don't know who you are.

Start by surveying what you already have in terms of social media initiatives, who owns those initiatives and who is affected by them, whether or not your culture supports a move into the social Web, which policies are in place to guide that move, and absolutely anything you can learn from what you've done in the past.

Part of knowing who you are is being realistic about how your organization might react to different scenarios. One of the last things you want to do is to try to be something you're not. It will become painfully obvious to you and your customers if there is a conflict between what you claim to be through social media channels and how you behave—or how you respond to criticism or crisis.

To understand your organization, start by answering the following questions:

- Who is using the social Web? (employees, departments, partners)
- What technologies or sites are being used?
- For what purposes? (personal use, corporate blog, ad campaigns, brand monitoring, and so on)
- Who currently owns the social media initiatives?
- Who are the stakeholders? (Who could be affected by a social media initiative?)
- Do social media initiatives have executive support?
- Does your organization have policies or guidelines in place?
- What can you learn from past successes and failures?
- Scenario planning: How would we respond as an organization...
 - to everyday customer complaints?
 - if sensitive details leaked onto the social Web?
 - if false rumors were damaging our brand?
 - to a crisis situation in the absence of key leadership?

Step 2: Know Your Consumers

The balance of power has shifted, putting much more control into the hands of consumers. They are no longer passive recipients of your sales and marketing efforts. Consumers are helping to shape your brand at this very moment, having the conversations with other consumers that will ultimately affect your revenue. It's up to you to find out where these conversations are occurring and how to communicate on your consumers' terms.

Start by listening and taking notes. Use a monitoring tool to keep an eye on conversations unfolding in the social Web (Twitter, YouTube, Facebook, key industry or consumer blogs and forums, and so on). If you chart the activity diligently for a month or two, you'll start seeing a clear picture of what you need to do and why. There is a possibility that you won't see much activity out there, especially if your organization is not business-to-consumer (B2C)-oriented. Nevertheless, this is still critical information that will help you create an appropriate social media strategy.

In order to understand your customers, you can start by answering the following questions:

- What is your target audience demographic? Does the social media graph match your overall target market?
- Where have your organization, products, or services been mentioned? Keep a list of all the sites and a running tally of conversations noted on each.
- What is the general sentiment of comments about your organization? Keep a running tally of positive, negative, and neutral mentions.
- What are the trending topics around your organization and within your industry?
- Who are the major influencers related to both your brand and your industry? How far-reaching are these influencers' social networks?
- What do your consumers need? Pay attention to complaints and suggestions, even if you are not quite ready to respond at this stage.
- What are the areas of value you can bring to consumers through the social Web?

Upon reaching the end of Steps 1 and 2, you should have four buckets of information to be used for the next steps:

- Internal stakeholders
- Key lessons learned from past initiatives
- Target audience
- Identified needs

Step 3: Set a Goal

If you want to gain business value from the social Web, you first have to know what you're trying to achieve. The key here is to start small, focusing on one specific goal. Many organizations set out to reduce support costs or improve customer satisfaction. Others may have an influx of product or service suggestions from their customers, and want to make it easier to capture and manage those ideas. Other goals include commerce, awareness, and customer loyalty. These are typically the easiest entry points with the most-proven results.

Start by identifying your top goal based on the information you gathered in Steps 1 and 2. Then map out the different areas you need to address related to that goal.

If your goal is to improve customer satisfaction, you will want to start by addressing the areas that touch upon customer satisfaction—within the framework of process and culture (what and who needs to change); technologies and tools (what to use to get there); and key performance indicators, or KPIs (what to track).

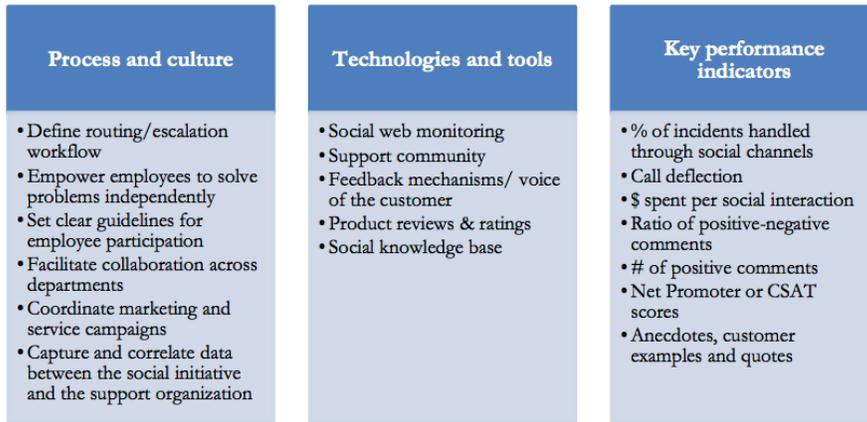


Figure 2. These are the specific areas to address to meet the goal of improving customer satisfaction.

If your goal is to drive innovation, you'll want to follow a similar process but focus instead on issues related to driving innovation through social media.

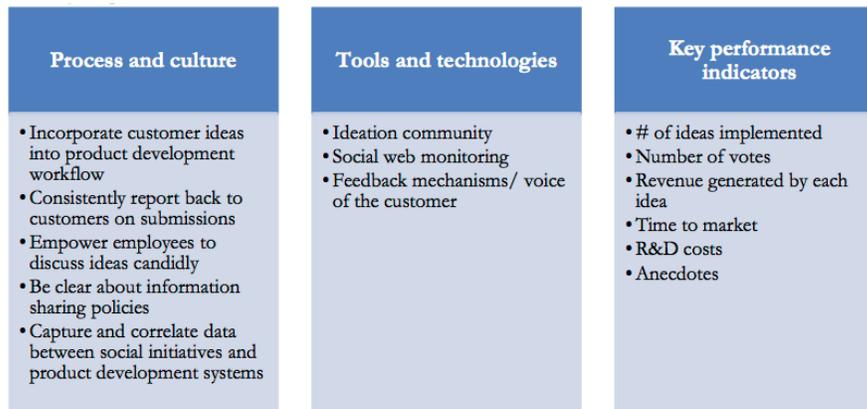


Figure 3. These are the specific areas to address to meet the goal of driving innovation.

As a final example, if your goal is to increase brand awareness you will want to focus on awareness issues, again within the context of process and culture, technologies and tools, and KPIs.



Figure 4. These are the specific areas to address to meet the goal of increasing awareness.

When setting a goal, be sure to cover each of the following items:

- What opportunities do you see in using the social Web? Use the information from Steps 1 and 2 to identify areas of greatest opportunity.
- Narrow your scope to a single goal (or a set of closely related goals).
- Define the metrics. Make sure you know how and where to access them, as they will likely come from different systems at first.
- Create a short list of technologies and tools needed to support your initiative, including free online tools, vendor purchases, and existing systems you'll want to employ.
- Keep a running list of all the process and cultural changes that need to take place.

Upon reaching the end of Step 3, you should have a high-level map of the major elements that need to be considered, addressed, and tracked in your social media strategy. In the final two steps, you'll take concrete actions toward launching your plan.

Step 4: Form a Social Media Team

A successful social media strategy crosses the boundaries of department and hierarchy because—in the social realm more than any other—consumers expect a seamless experience. If your marketing team is broadcasting one message while your support organization sends another through Twitter, your customers will quickly start to question your authenticity and reliability. To avoid inconsistencies, all social media initiatives should be governed by a cross-functional team and backed by at least one executive sponsor.



Figure 5. A cross-functional team backed by an executive sponsor should oversee the social media strategy.

Keep in mind that the purpose of the team is to hold the middle. Indeed, most social media initiatives will likely have stakes in various groups across the company. Your social media team may perform some or all of the following functions, depending on the specific needs and goals of your organization:

- Guide ongoing social media initiatives
- Collect and implement best practices
- Make sure the initiatives are properly staffed
- Develop policies and guidelines for employees
- Provide documentation and training to employees
- Track results and correlate data across systems
- Advise marketing on social media brand evolution
- Provide an escalation path for public relations problems
- Lead the culture shift by example

In order to form a successful social media team—one that works toward your stated objectives and earns buy-in from the rest of the company—keep in mind the following recommendations:

- Include representatives from all levels and departments within the organization.
- Use the cross-departmental view to understand where existing resources, systems, and processes can be leveraged.
- Involve team members who already participate on Twitter, LinkedIn, blogs, communities, and so on—or who are willing to start.
- Make social media team members into ambassadors or pioneers (or guinea pigs) for the organization.
- Draw up a social media team charter to clarify roles and responsibilities.
- Create an internal forum or collaboration space for this team.

With a team in place, you will be ready to start making specific plans for a social media initiative rollout across the organization. Be sure to leverage the team's varying positions and perspectives to manage and coordinate multiple projects in parallel and encourage widespread employee participation.

Step 5: Map It Out

One-off social media initiatives—such as running a campaign on YouTube or assigning an intern to respond to customers on Twitter—are easy entry points, but they won't bring extended value to your organization. Once you've connected with people through the social Web, you need to live up to continuing expectations for engagement and build on the relationships you create. It is generally a good idea to build testing, feedback, and iteration cycles into your plan so you can improve and focus your efforts over time.

Start by mapping out your first six months. Leave room for adjustments, of course, but have the people, the content, and the general plan ready for each step along the way. Your six-month plan may look something like this:

TABLE 1. MAP OUT YOUR SIX-MONTH SOCIAL MEDIA PLAN

TIMELINE	ACTIVITY	PURPOSE
Months 1–2	Technology review	Identify tools needed to reach social media goals
	Technology implementation	Start building and integrating selected tools to put a foundation in place
Month 3	Policy/guideline rollout	Clarify intentions and expectations to avoid improper employee behavior
	Training	Educate and empower employees on the front lines
	Social site monitoring	Keep tabs on conversation topics and key influencers; respond as needed
	Feedback cycle	Gather initial input on social media initiatives
Month 4	Community launch (internal)	Familiarize employees with the approach; encourage discussion and collaboration
	Executive blog	Establish a corporate voice to guide the discussion
	Employee blog	Get employees involved; build content for external launch
	Feedback cycle	Understand gaps in execution; take time to resolve any issues
Month 5	Baseline metrics	Start to track membership/participation trends for later comparison
	Selection of founding (external) members	Seed community with activity and content
	Community launch (external)	Include customers, partners, and other interested parties in the conversation
	Feedback cycle	Gather explicit and implicit input on what is and isn't working; take time to improve usability
Month 6	Coordination with third-party sites	Broaden and extend the conversation with customers and fans on Twitter, Facebook, LinkedIn, YouTube, and so on
	Outbound social Web and e-mail campaigns	Periodically refresh community membership with customer base and consumers

When mapping out your strategy, remember these best practices:

- Develop policies and guidelines, and then distribute to employees.
- Define an escalation process for potential public-relations issues.
- Provide internal training sessions, if necessary.
- Gain consensus on a six-month game plan.
- Choose and implement social media technologies.
- Have initial content (blog posts, for example) prepared ahead of time.
- Make sure campaigns are coordinated across departments.
- Build feedback into every step, and be prepared to adapt your plans.

Conclusion

These days, case studies about business exploits in the social Web are a dime a dozen. Stories abound of big brands running off massive social Web campaigns with impressive effects on top-line revenue and bottom-line costs. Also prevalent are the stories of failure—organizations whose brands suffered at the hands of socially empowered consumers. We can all learn from both types of examples—how to both delight consumers and avoid risk—but we need to understand these issues in the context of our own unique organizations, industries, goals, and consumers.

That is why your social media strategy must be built from the ground up, with all the rigor and planning you would apply to any other business initiative but with a few key distinctions:

- Consumers must be at the center of your strategy.
- The cultural shift is more important than the technological shift.
- Collaboration and feedback must become a force of habit.
- No social media initiative is ever complete; you must continuously iterate forward.



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Hardware and Software, Engineered to Work Together