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Social Media Playbook:

Everything Your
Company Needs
to Know to Succeed
on the Social Web

CONTENT BY JESS3 &
JOE CHERNOV (@JCHEROV)



Social Media Playbook

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Technically, it's swine flu.
But we call it H1N1 because
the hashtag's shorter.



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Social Media Playbook

Introduction

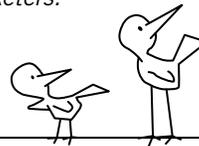
WHY USE THIS PLAYBOOK?

- ▶ This Playbook will help you engage and interact more effectively online, by showing you how to:
 - > **Leverage** best social media practices
 - > **Link** online engagement to targeted objectives specific to your goals
 - > **Access** supplemental applications to quantify, monitor, and expand efforts towards reaching those goals

This Playbook has been compiled based on the collective experience and insights of the Eloqua team and its online network of thousands of friends, followers and fans.

Disclaimer: This Playbook does not survey all social networks. Instead it focuses on the most important networks and most essential behaviors for businesses seeking effective social media engagement.

Lastly, the Playbook was written for all marketers; therefore, you will find some counsel that is best suited for consumer marketers, and other tips for business-to-business marketers. Ultimately it was our goal to speak to all marketers.



WHO THIS PLAYBOOK IS FOR

Users who are **new** to social media engagement

Users who are **already engaged** in social media who want to take their participation to the next level

HOW TO USE THIS PLAYBOOK

For best results, adopt and adapt these practices, strategies and tactics in a manner consistent with your personal comfort and your corporate culture. As always, changes in corporate policy should be executed in concert with your organization's legal and human resources teams.

WHAT DOES SOCIAL MEDIA NEED TO REALLY WORK?

Social media works best when there are real people, with genuine intentions and quality content, behind every profile, tweet and tag.

Automated social-posting systems diminish the value of your presence by corroding real engagement. Ultimately, what motivates people online is similar to what motivates them offline. According to professors Peter Kollock and Marc Smith motivations for contributing to online communities do not rely on altruistic behavior on the part of the contributor they depend on these four pillars¹:

- > **Anticipated Reciprocity.** *A person is motivated to contribute valuable information to the group in the expectation that one will receive useful help and information in return.*

- > **Increased Recognition.** *Recognition is important to online contributors. Individuals generally want recognition for their contributions.*
- > **Sense of efficacy.** *Individuals may contribute valuable information because the act results in a sense that they have had some effect on this environment.*
- > **Communion.** *People are fairly social beings and it motivates many people to receive direct responses to their contributions.*

Social media participation frequently suffers from the “tactical enthusiasm” syndrome. Your organization should be focused on objective-driven participation.

If you are like most social media users, you may have started out by signing up for an account because a friend or coworker suggested you try it out. You may find yourself using it when you remember and neglecting it when you don't.

The goal is to continue to engage consistently and authentically, while adding strategic thinking and planning to increase your company's effectiveness. Trainings, review of best practices, adoption of guidelines, organized/planned editorial content, company-wide awareness, and, most of all, peer support/promotion will all contribute to your ability to achieve these goals. To this end, this Playbook ends with a tip sheet entitled *Using Social Media to Cultivate Leads*.

¹ Wikipedia articles: [Virtual_community](#), [Egoboo](#) and [Sense_of_community](#) (Retrieved February 2010).

Social Media Playbook

Introduction cont.

While there are hundreds of ways to approach the social web, there are 10 basic principles that should always guide your participation:

1 Do Listen. The most important first step you can take in social media is to listen before you “speak.” Social media offers a unique window into the lives of colleagues, customers, and influentials, but only if you don’t talk over the opportunity. Adhering to a “listen-first” mantra will help you can gain valuable insights that inform how – or even if – you want to engage.

2 Do be authentic. The era of online anonymity is over (if, in fact, it ever really existed). Social media demands honest, transparent, and authentic participation. Social networks are *human networks* – so don’t be afraid to share about your hobbies, travels, and even weekend adventures (to the extent

that sharing this information is comfortable with you personally and doesn’t run counter to the company’s culture and values.)

3 Do be consistent. When cultivating your social media presence, be consistent about the information contained in your profile and the content you share.

If possible, establish brand guidelines for individual and group participation within your company so that you can build trust with and recognition from others whether you are on Twitter, Facebook or blog comment sections.

4 Do be gracious. Applauding the good work of others and thanking others for their support are the cornerstones of any good community on or offline. Whether it is citing a source with a link in a blog post, retweeting or giving a “shout out,” be sure to credit and thank the original creator.



On the internet, nobody knows you're a dog. But they can smell a marketer from a mile away.

Social media works best when there are real people, with genuine intentions and quality content behind each and every profile, tweet and tag. If there is an automated system in place, the value and engagement drop significantly

5 Do disclose. Letting your online audiences know that you work for your company is essential if you are tweeting, blogging or posting favorably about your company online. A great way to do this is filling out your Twitter bio with a brief line about your company affiliation, as well as including your company's name as an employer on your Facebook and LinkedIn profiles. Additionally, if you are supporting the efforts of a client, make sure to disclose your interest in the matter. For more on disclosure best practices, visit the Word of Mouth Marketing Association's ethics / disclosure page: <http://womma.org/ethics/disclosure/> (full disclosure: Eloqua is a member of WOMMA and serves on its ethics committee).

6 Don't share confidential information about your company, clients, colleagues, partners, or competitors.

7 Don't criticize your company, clients, colleagues, partners, or competitors.

8 Don't spread rumors or false information about your company, clients, colleagues, partners, or competitors.

9 Don't reveal personal information about any of your colleagues. Examples include tweeting side conversations or posting personal photos to Facebook or Flickr without their explicit permission.

10 Don't misrepresent yourself or your company. Every action online is, at some level, traceable, so make sure the content that you are creating and impressions you are leaving, no matter how big or how small, are accurate and honest.

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Major Platforms

Twitter

- ▶ From coordinating disaster relief to carrying out customer service in front of a crowd, Twitter connect the right people at the right time in 140 characters or fewer.

Key Facts

- > Twitter is a “micro-blog” or “micro-communications” tool and platform
- > Twitter has more than 75 million accounts worldwide
- > Twitter allows a user to send a text-based message, known as a “tweet”, up to 140 characters in length, to other users who have requested to receive updates from that user
- > Twitter includes social functions to publicly message (@message) and privately message (direct message or DM) other users.



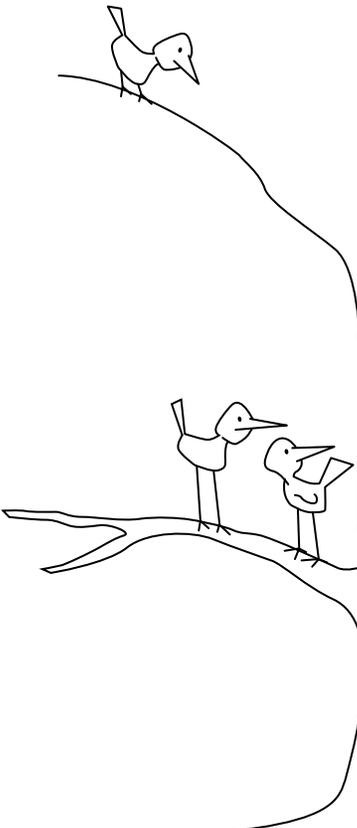
Twitter Advantages

- ▶ **Platform combination platter:** Twitter is a mind-bending combination of blogging, emailing, social networking, and texting, that allows users to cast a wider net to people they otherwise wouldn't be able to reach. Stay on top of industry trends and news at the same time as you build your network of friends, family, and colleagues.
- ▶ **The new face of marketing:** Twitter allows companies to listen in on and participate in public conversations customers are having, which enables them to attract new customers and strengthen relationships with existing ones. Companies can test out a new product or get feedback on an existing one for very little cost while creating a buzz at the same time.
- ▶ **Credible traffic funnel:** Twitter is fast becoming a top referrer of traffic to blogs, news sites, and company websites. It accelerates and amplifies business, politics, and entertainment news and provides a new way to place stories with key players.
- ▶ **Instant roving reporter:** People go to Twitter to find what others are talking about in that very moment—with the ability to examine the profile (name, biography, location), followers, and previous posts to Twitter of those doing the talking. Since Twitter profiles are mostly public, users can also have instant access to data contained in the network.



THE POWER TO SUCCEED.

Twitter users have employed the platform to stage protests, coordinate disaster relief, break news, air grievances against brands and stay in touch with one another

- 
- ▶ **Easy access to influentials:** The most active and influential accounts on Twitter are those run by the media, politicians, and tech experts. (How celebrity **Demi Moore's twitter feed** helped prevent two suicide attempts, is just one example of this.) This presents a prime opportunity for your company to be visible to opinion setters and their bases of followers.

Twitter Disadvantages

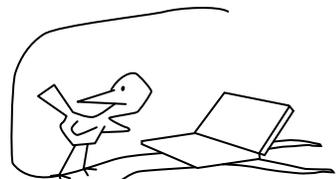
- ▶ **Far from mainstream:** Less than 11% of all U.S. Internet users visit Twitter, with 5-7% of those using Twitter actually participating on the platform.
- ▶ **Young people don't want it:** About 17% of all Twitter users are between 13 and 17, with just 2% of all users in the pre-teen demographic. Teens say they don't need Twitter because text messaging is their main method of communication and they are more accustomed to the Facebook platform, according to the **New York Times**.
- ▶ **Short shelf life:** Twitter is a strong, but fleeting content tracking tool. Be advised the shelf life of tweets in terms of impact ranges from a few hours to a few minutes.

How to use twitter

- 1 Sign up
- 2 Find people
- 3 Post helpful content
- 4 Take your Twittering to the next level

1 Sign up at Twitter.com

Choose a user name that is logical enough for easy recognition by users yet flexible enough to encompass all of your tweetable interests. For many people, using your first and last name or the name of your company makes the most sense. If you have a brand that is already recognizable, an astutely chosen Twitter name can reinforce and amplify that image.



Chirp and peep are so passé. Now it's all twitter!

Social Media Playbook

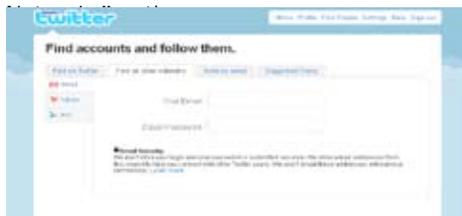
Twitter Cont.

2 Find People

Using Twitter's "Find People" search function in the menu bar at the top of your



- > **Upload your personal and professional email contacts** through the "Find on Other



- > **Find your following/followers comfort zone**

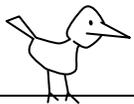
- > *Follow your colleagues.* This is a great place to start – not only can you learn from more advanced users, but it helps establish a network of people who can be mobilized in the future.

- > *Follow accounts owned by people with whom you want to connect.* One of the best ways to engage with individuals on Twitter is to follow them, then start conversations through @ messages and, in the event that they follow you back, through direct messages (DMs) as well.

- > *Follow accounts that you find interesting.*

It's common to treat part of your follower list as social and real-time RSS feeds, where you follow news accounts from major media organizations, industry blogs, and industry thought leaders. By following these types of "feed" accounts, you will be able to receive updates in real-time via Twitter.

- > *Be mindful of your follower : following ratio.* Avoid following a significantly larger number of Twitter accounts than follow you. This can appear overzealous at best and "spammy" at worst. Consider, for example, that if you are followed by 5,000 users, and follow 5,000 back, can you keep up with the level of engagement that comes with the @ messages and direct messages (DMs) that these accounts might demand? You might want to keep your "following" number to less than 1,000 of the accounts that you find most interesting and fit into your overall goals for engagement.

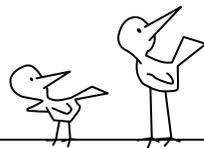


Twitter influences the influencers. Currently, some of the most active and influential accounts on Twitter are those run by members of the media, politicians and technologists

3 Post helpful content

POSTING 101: KEY TERMS

- > **Following:** To receive messages on Twitter, you follow other people and companies you're interested in. Their messages appear in your incoming timeline on your Twitter home page and your followers get your messages.
- > **Tweet:** Answers the question "What are you doing?" or "What has your attention", as Social Media blogger, [Chris Brogan](#) says. Users are allowed 140 characters maximum for each tweet, but 100-120 characters is recommended to leave room to be retweeted (RT).



- > **Retweet (RT):** Giving someone a public shout out where an already tweeted resource is usually shared with followers. Example: "RT @Username: Original message, often with a link."

- > **@username:** Companies can exchange public messages with individual users. For example:

"@JohnHancock Glad you liked our software program Handwriting Magic. Thanks for twittering about it."

If @JohnHancock is following your account, your message will appear directly in the individual user's account if he is following your account, or, if he's not following your account, in his folder of @username mentions. Those following both you and @JohnHancock will also see the message and it will appear in search results.

- > **Direct Message (DM)**

DMs are a way for Twitter users to privately to connect. You can only DM people who are following you, and, conversely, you can only receive DMs from people you are following.

Advanced posting

Tweeting from a web browser has limited functionality, so we suggest using [TweetDeck](#) or [Hootsuite](#) to maximize your Twitter monitoring and engaging experience. (More information on this later in this section.)

Social Media Playbook

Twitter Cont.

POSTING ETIQUETTE: DOS AND DON'TS

DO'S

- > *Be yourself, be original:* Social media is meant to be human, so don't be afraid to share about your hobbies, travels and even weekend adventures (within the boundaries of good taste, of course).
- > Make sure to **disclose in your Twitter bio the company you work for**, an industry best practice touted by the Word of Mouth Marketing Association's (WOMMA) code of ethics.
- > *Participate regularly:* Almost all sites that assign account holders a Twitter score place a **high value on activity level**.

> Report events with *behind the scenes coverage*, especially photos

> Share jokes, puns and quirky things that happen to you. Humor and playfulness are at the core of what it means to be human, so don't be afraid to let your hair down a little (but not too much, remember, it is a public record).

> Give credit to others for the information you found and "name-check" people you want to reach with your tweet. Reciprocity is the currency of the web; the more you give, the more you get.

> While pure text tweets are appropriate when you have an original thought to share or when you want to start a conversation, make sure to mix in rich media (links, photos, videos) to keep your tweets dynamic and inviting.

> Become an authority and provide value.

DON'TS

> *Be unprofessional:* When it comes to company clients, partners, colleagues, and even competitors do not share confidential information, criticize, or spread false information. In other words, don't be evil.

> **"MeTweet" all the time.** Too much corporate-promotion can lead followers to tune you out. Make sure to contribute to existing conversations, retweet smart links/statements and ask your follower base:



The platform is not yet widely adopted by general Internet users. Current statistics show that less than 11% of all U.S. Internet users visit Twitter; the number of participants is closer to 5%-7% from this same U.S. group

“what are you doing?” and “how are you doing?” The ideal balance is 90% about others, big ideas, and resources with just 10% about you.

- > **RT with abandon.** Make sure you click through and read the resources you are retweeting. People often interpret a RT as an endorsement of the content. Be sure that you have read all of the tweet and subsequent links before you RT content.
- > **Auto-tweets:** auto-tweets from an RSS feed can often come across as spam and turn off your followers.
- > **Auto DMs:** There are multiple services that will allow you to send an automated direct message to each new follower on your Twitter feed. At best it tricks a few of your followers and at worst, it turns them off all together.

> **Too much.** You want to avoid filling your followers' home screen with nothing but tweets from you and/or a company-related account.

> **Not enough.** Try to tweet at least several times a week, if not daily. This is key to creating a follower base, media attention, and a deeper level of engagement that advances your goals.

4 Take Your Twittering to the Next Level

Use more advanced posting techniques:

- > **Reply** to another user's tweet using @ Username
- > Prefacing one's comment with the other user's Twitter handle signals to that user and to others that your reply is a message directed at them that others may also see.

> **Manual or Automatic Retweet (RT)**

To repeat a message by another user, sometimes accompanied by an additional comment (only when manually retweeted). This additional comment may preface the RT or follow it, if separated from the retweeted message with a pipe “|” or double-slash “//.”

- Manual: RT @Username (tweet text)
- Automatic: By selecting the “Retweet” button in bottom right hand corner of the tweet you wish to retweet, you will be prompted “Retweet to your followers?” Once



Social Media Playbook

Twitter Cont.

you select “Yes” it will automatically repost the tweet in your update box. You cannot make any edits to the tweet. That can only be done in the Manual Option 1.

> Mention

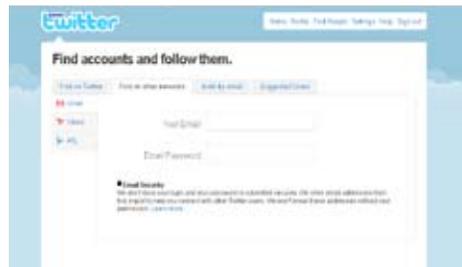
(tweet text) @Username (tweet text)
Discussing another Twitter user in a tweet. Using mentions can be especially useful for giving credit to other users by making your followers aware of their handle. The message will appear in the Mentions column of those who you mentioned.



> CC / Alert

When you have information that you think one or more of your followers or people you are trying to attract on Twitter might like, you can use the “cc” to get in their tweetstream as an @ reply, but without being too forceful. (Insert tweet) cc: @Username—can also be added parenthetically like this (cc: @Username)

Use Twitter’s “List” function to create and follow targeted subgroups of people.



Some suggested List categories include:

- > Blogs and bloggers in your industry (technology, CPG, political, health, etc.)
- > Media outlets and reporters in your industry (can be included with bloggers, but might also be good to look at separately)
- > Other key thought leaders such as analysts and pundits who regularly opine on your industry and / or “set the agenda”
- > If you are in a government relations role, make sure to have a list of legislators and legislative staffers in your state and / or issue area

The more people you follow, the more the List function will come in handy, as it helps you parse out relevant conversations and people based on your desired outcome (trying to contact the media, stay on top of industry trends, catch up with a particular community such as those you follow who enjoy sports or politics)

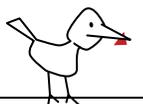
- > Colleagues and partner organizations Geographically-specific contacts
- > Using lists gives your company the ability to see what issues are being covered and discussed by each group for your own intelligence gathering, and you can also more readily reach out to certain subgroups when you have an issue to pitch to the media or want to be heard by decision makers.
- > It's also worth noting that Twitter has a "private List" function that permits users to create Lists that cannot be seen by others. This is a helpful way to reduce the size of your Following universe should you find there is simply too much information being piped into your feed.

LEVERAGE TRENDING TOPICS AND EVENTS ON TWITTER: OBSERVE AND LISTEN

What are others talking about? What value can you add to the conversation?

- > **Twitter's Search Engine** (search.Twitter.com) is a good place to start for basic searches
- > When thousands of users all tweet using the same term and/or hashtag, the topic becomes an official "Trending Topic." You can view what is trending on the right hand side of your Twitter account when you are or are about to log in. The art and science behind trending topics, much like Google search results, is held only by those who run the platform. But it's clear that getting a dedicated and diverse user base tweeting about something in concert with each other can certainly drive pick-up from a broader group of users.

- > **Industry Events:** Make sure to participate in existing conversations by using the established hashtags, which often are announced at marketing and technology events, and sometimes include the year the conference took place (e.g., #SXSW10).
- > **Company Events:** Employees are encouraged to establish and promote new hashtags for your events (e.g., #YC09 or #YC10). Make sure that you communicate to those attending—and those watching from an afar—what hashtag they should use to tag their content. You can do this through traditional marketing and advertising, as well as through other social media platforms such as Facebook and your company's blog. The more you can work to "get the word out" in advance of the event during the registration period and when working with those requesting media passes, the



Social Media Playbook

Twitter Cont.

more the hashtag will likely take on its own life and momentum with little additional promotional efforts once the event nears.

> **Trending Conversations:** Look for virtual-only conversations that crop up around ideas, issues or current events and participate where relevant and appropriate to your company's social media goals. Your organization should also be sure to comment on industry-related topics, but everyone is also encouraged to discuss whatever topics interest them—TV shows (#30rock), a movie you saw (#ironman), news stories (#haiti). You are free to express your personality and should feel free to tweet about personal interests, everything from #brunch to the #weather.

> To see topics that are “trending”, visit applications like <http://tweetstats.com/trends> and others available on the master Twitter application directory <http://oneforty.com>.

EXPLORE APPLICATIONS TO IMPROVE AND ENHANCE YOUR EXPERIENCE.

Experiment with applications to help you **monitor, analyze, and participate** on the go. Then, optimize your content once you've been up and running for a few days or weeks.

> **Master Directory: OneForty.com** -

Complete directory of applications with a recommended “**essential**” section, too. (Note that OneForty.com founder @pistachio is a wealth of information on Twitter, and a person definitely worthy of following.)

> **TweetDeck:** Good for tracking terms and creating groups to follow; allows you to save your preferences and organize your followers. It also allows for management of multiple Twitter accounts. Requires that you download and install it to your machine.

When thousands of users all tweet using the same term and/or hashtag, the topic becomes an official “Trending Topic.”

- > **Hootsuite:** Runs directly from your web browser. Similar functions to TweetDeck but also great for scheduling your tweets in advance to go out on a specified date at a specified time. It also allows for management of multiple Twitter accounts and it recently released workflow tools to simplify account management for corporate handles run by multiple staffers.
- > **Twazzup:** Great for when you are monitoring a hashtag during a live event.
- > **Twubs:** Similar in functionality to Twazzup, allows you to save, capture and archive hashtag-based discussions.

Analytics:

- > **Twitalyzer:** Evaluates the activity of any Twitter user and reports on dozens of useful measures of success in social media.

- > **TwitterCounter:** Tracks growth with a visual chart of your followers over time.
- > **Klout:** Measures influence on topics across the social web to find the people the world listens to most.
- > **Tweet Reach:** Measures the reach of your tweets/retweets (RTs) via impressions, a number reached based on how many followers a user has; This application does not count unique impressions.

Mobile:

- > **Blackberry:** While BlackBerry now has its own native mobile application, **ÜberTwitter** is the recommended choice. A lighter version of this application is **OpenBeak**, which takes up less battery power and memory, but has fewer features.
- > **iPhone: Tweetie 2:** This is the recommended iPhone application and was recently purchased by Twitter.

- > **Mobile SMS:** By adding Twitter to your address book under the specific number (for example, “40404” for USA) and syncing it up on your Twitter profile on the web, you will be able to text message your updates to Twitter from your mobile device:



Include Photos and Videos in Your Tweets

- > Tweet text needs to be less than 110 characters to leave room for the URL that the application creates for your photos and videos. Leave room for being retweeted by subtracting the length of your Twitter username (e.g., @JohnHancock) plus 4 more characters to cover the @, RT, and space between the two.

Social Media Playbook

Twitter Cont.

- > Make sure to set up your account on the Web before you go to your mobile device. It will automatically generate a unique email address for you to send your media to, which should be saved as a contact in your phone (e.g., TwitPic @JohnHancock)
- > **Flickr2Twitter:** This application allows users with existing Flickr accounts to post your photos via email and the web directly to Flickr and Twitter.

Photo Tweeting Applications:

- > **TwitPic:** Twitter photo sharing site that supports upload via web and email.
- > **TweetPhoto:** Twitter photo sharing site that supports upload via web and email. Offers a number of additional features, such as voting / favoriting stats, geo-tagging, and Facebook integration.
- > **Yfrog:** Twitter photo sharing site that supports upload via web and email; most popular for iPhone users, as it is a default setting on many iPhone applications.

Need More Twitter Resources?

We have you covered:

- http://business.twitter.com/twitter101/best_practices
- <http://business.twitter.com/twitter101/learning>
- <http://business.twitter.com/twitter101/resources>
- <http://blog.twitter.com>



THE POWER TO SUCCEED.

By following others from your company, you will likely get to know them better and be able to help spread the word when they have news they are sharing on Twitter about company initiatives and/or personal news.



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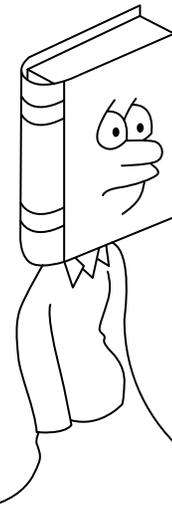
Facebook (FB)

▶ *Considered to be the most popular social network on the Internet, Facebook is a “superplatform” that allows users to connect and publicly and privately share all kinds of information with the people in their network.*

Key Facts

- ▶ Facebook was founded in 2004
- ▶ Facebook has over 450 million accounts worldwide, with almost 250 million visitors per day as of May 2010.
- ▶ Internet users spend more time on Facebook than on Google, Yahoo, YouTube, Microsoft, Wikipedia and Amazon combined, according to the social media blog Mashable
- ▶ Facebook’s most used and basic features include, but are not limited to:
 - > Searching and adding friends, sending them private and public (Wall) messages;
 - > Updating your personal profile with daily information (what you are up to, where you are traveling, what you are thinking) and more permanent information (your employment and educational history, your favorite pastimes and interests, etc.)

- > Joining networks organized by city, workplace, and school or college.
- > Becoming a “fan” of things like brands, companies, celebrities, politicians and other high-profile individuals.



How long have you been on Facebook?

According to the social media blog Mashable, Internet users spend more time on Facebook than on Google, Yahoo, YouTube, Microsoft, Wikipedia and Amazon combined

- > Tagging friends (via a hyperlink to their actual profile) in photo, video and status update posts.
- > Creating more personalized experiences on a variety of partner websites through Facebook Connect and other Social Plugins such as the Like button and Friends Activity Stream (e.g., <http://washingtonpost.com>)

Facebook advantages

- ▶ **Personalized, networked web navigation**
 - > **Facebook Connect**—Connects your visitors' Facebook profiles to your company site, allowing them to seamlessly share and engage with your content, while having their activity show up on their Friends' Wall Feed.
Learn more here: <http://developers.facebook.com/docs/guides/web>
 - > **Social Plugins –“Like” / “Activity Feed” / “Recommendations”**: Announced at Facebook's annual F8 Conference in late April 2010, these social plugins have been launched on 30 partner sites and will soon be available to the public. They enable more social and personal experiences around your website's content, powered by the Facebook data and network of your visitor.

Learn more here: <http://blog.facebook.com/blog.php?post=383515372130>

- > **Greater privacy, greater comfort**: FB is affords users greater privacy than other communities like Twitter, which means users get to choose who views their content. As a result, users feel more comfortable sharing with their Friends or fellow Fans of particular Pages. They create content and engage with brands and users more openly than on YouTube and Twitter. However, FB has come under fire in recent months for their adjustments to their Terms of Service, where they are allowing more personal posting and content to be publicly searched and indexed by search engines like Google and Bing. They have also been criticized for having an unruly, 5,000+ word privacy policy, which is daunting to casual users.



Social Media Playbook

Facebook Cont.

- > **Credible traffic funnel:** Like Twitter, FB is changing the way users find websites: Sharing links to interesting, helpful, or funny websites is an integral part of the way users engage with each other on FB. Webmasters have identified a significant spike in web traffic as the result of shared FB links.
- > **Highly personalized advertising:** Because of Facebook's "closed" platform, users feel more comfortable sharing personal information such as their political affiliation or their favorite movie than they would on other sites. These granular details about a user's preferences allow advertisers to create campaigns aimed at much smaller, more appropriate audiences than ever before, while maintaining user privacy.

- > **The Feed Factor:** Each time a Fan engages with a Page, this action is updated within their Wall Feed, alerting Friends about their recent interaction with a company brand and introducing the Page to a new group of users. The Wall Feed is a comprehensive and accessible real-time archive of a user's specific interests.

Facebook Disadvantages

- ▶ **Metrics**
Due to its Privacy Policy, FB has limited the metrics currently available for Page Administrators. FB has yet to offer metrics similar to Google Analytics which would enable Page Administrators to gain a deeper understanding of their Page's Fans and Visitors.



Facebook is changing the way users find websites. Sharing links to interesting, helpful or funny websites is an integral part of the way users engage with each other on Facebook

► **Administration**

Currently FB only allows Administrators to moderate Comments and post content to the Wall Feed. A tiered management structure would allow Page owners to give your company's members the ability to post Wall Updates and engage with Fans on behalf of the brand.

Stay on top of present and upcoming changes:

<http://www.allfacebook.com/>

<http://insidefacebook.com>

<http://blog.facebook.com/>



Social Media Playbook

Blogs

▶ *Your blog should ideally be the hub of your company's content-creation wheel by providing relevant commentary and news that positions you as an insider within your particular industry.*

▶ **Should my company start a blog?**

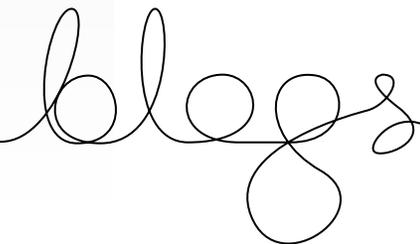
▶ **What are the options?**

> **Support colleagues:** Leave a comment, tweet about it, and/or share the link on Facebook. This helps strengthen coworker relationships, while also showing visitors – who could be a prospect, a member of the media, or even a competitor – that your organization is a team.

> **Become a thought leader: contribute.**

Your voice and insights are unique and they matter. The more diverse, expert and useful your posts are, the greater your chances are to increase leads, media coverage, and overall industry clout. Is there something that your company does that you know really well that others always ask you about? Consider writing a post, or series of posts, for the company blog.

> **Point prospects to relevant entries.** Your goal is to have timely, relevant, and insightful content about your industry and your products. Follow-up with a lead or connect with a new prospect by sending them a link to a relevant blog post that *someone from your company has written* with a simple "Thought you might be interested in this post." Use your organization's blogs like a tailored Wikipedia entry.



Your voice and insights are unique and they matter. The more diverse, expert and useful our posts are, the greater our chances are to increase leads, media coverage and overall industry clout

► **How should I engage in the larger blogosphere?**

- > **Build relationships with influencers and prospects:** Marketers, reporters, technologists and even clients maintain personal and professional blogs. Searching someone's name within [Google Blog Search](#) and/or [Technorati](#) their blogosphere activities. Once you have found them, work on becoming a regular commenter and a promoter of their content on Twitter and Facebook.
- > **Track competitors:** Many of your competitors maintain blogs, Twitter feeds, and Facebook pages. By following what they are talking about and promoting, you can gain important insights into what they are interested in.

- > **Gain industry insights:** With over 126 million blogs and counting, there is a blog for just about anything you might want to know about.

Examples:

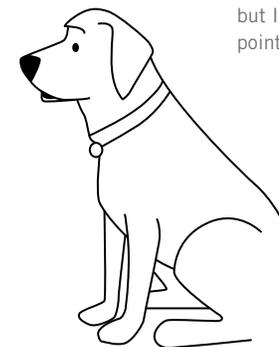
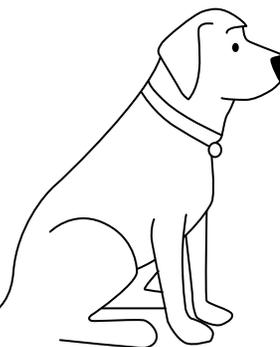
Social media and technology: [Mashable](#), [ZDNet](#), [TechCrunch](#) and [ReadWriteWeb](#).

Macro trends in marketing, media and advertising:

[AdRants](#), [AdFreak](#), [MediaShift](#) and [MediaPost](#).

- > **Set up RSS feeds to more effectively and efficiently manage the blogs you read:**

There are a number of RSS (Really Simple Syndication) readers that you can use to organize the blogs that you are following and keep on top of your blog reading. [Netvibes](#), [Google Reader](#), and [my6sense](#) (an iPhone app) are recommended.



I had my own blog for a while, but I decided to go back to just pointless, incessant barking

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Social Media Playbook

LinkedIn

▶ *LinkedIn is a business oriented social networking site that allows you to display your professional experience, academic accomplishments, connect with former and current colleagues, and perform prospect research. It was founded in May 2003 and has over 60 million registered users from more than 200 countries.*

Why Use LinkedIn?

LinkedIn is most useful for those interested in making business connections, cultivating leads, developing their personal brands and growing their professional networks.

▶ Specifically you can:

Use LinkedIn to serve as a **virtual Rolodex™** of contacts that can be accessed from wherever you are.

> Connect with other professional and educational contacts that may **serve as leads themselves, or connect you to other leads**. The platform allows you to identify the types of connections that your connections have (e.g., first or second degree) and see how far away your contacts are from people you are trying to contact.

> **Keep track of** your job positions, promotions, and accomplishments in one place.

> Have the potential to **rank well for your name in search results** (depending on how many other people share your same name and their activity level online) with highly relevant content that you have control over, such as your resume

> Connect with **current and former employees of your company**.

For more information on how to leverage LinkedIn to generate and cultivate leads, please see the tip sheet at the end of the Playbook.

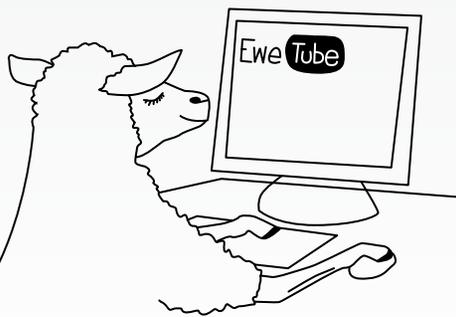
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YouTube

▶ *YouTube is a video sharing website on which users can upload and share videos. Founded in February 2005 and acquired by Google in November 2006, over 20 hours of video is uploaded to YouTube each minute..*



Why Use YouTube?

- ▶ **Content Supplier:** YouTube videos are platform-agnostic and can be shared on nearly every platform. The same cannot be said for Facebook or Twitter, as YouTube does not currently offer the ability to post tweets or share Facebook status updates on this platform.
- ▶ **Google-Level Analytics:** Since it is owned by Google, the analytics include key word and traffic sources, Hot Spots (showing when viewers stop watching the clip), and insights about what other content users also watched.
- ▶ **Global Reach:** YouTube is available in 14 different languages and 21 different countries, positioning it as one of most global social networks.
- ▶ **SEO Goodness:** Google rewards multimedia content with higher search rank. Uploading videos to your corporate channel, and linking / embedding those videos in your news releases is helpful for search rank.



Social Media Playbook

Wikipedia

What is Wikipedia?

▶ Wikipedia is an online encyclopedia created and maintained by volunteer editors. Founded in 2001 by Jimmy Wales and Larry Sanger, it has grown quickly to become the largest encyclopedia in the world, covering many more topics than any traditional encyclopedia before it. Wikipedia now contains more than 15 million articles, among them 3.2 million in English.

What Should I Know About Wikipedia?

▶ **Most important reference site on the Internet:** According to the website tracking service Alexa, Wikipedia is the 5th most visited website in the United States, and 6th most visited in the entire world, with more than 50 million visits per month. Wikipedia articles are often found at the top of Google search results, contributing to its prominence. Researchers, journalists, and students rely on Wikipedia daily as a starting point for research.

According to the website tracking service Alexa, Wikipedia is the 5th most visited website in the United States, and 6th most visited in the entire world, with more than 50 million visits per month

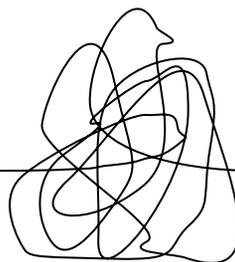
▶ **Let the reader beware:** The defining feature of Wikipedia is its open nature. Because anyone may contribute, new information may be added easily and mistakes can be quickly corrected. However, vandalism is a constant problem, and some information that appears authoritative may in fact be wrong. When in doubt, look to the references for more information.

▶ **Complex set of rules and community:** How does information get to Wikipedia and stay there? All Wikipedia editors are self-appointed and may change almost any page without prior review by any Wikipedia authority. Wikipedia content is governed by approximately 50 mandatory policies and 100 guidelines. The rest is decided by

consensus of participating editors, which sometimes leads to contentious disputes.

▶ **What to know about participating:**

Employees should find out what company policy is regarding editing of its page and adhere to those policies. However, if you decide to make changes to Wikipedia articles related to your *personal interests*, first create an account (link in the upper-right hand corner of every Wikipedia page). Familiarize yourself with the site's policies and guidelines (search Google for "Wikipedia policies"), the most important of which is to be polite.



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Delicious

What is Delicious?

- ▶ Founded in 2003 and bought by Yahoo two years later, Delicious is a social bookmarking web service for storing, sharing, and discovering web bookmarks. It has over 5.3 million users and 180 million unique URLs bookmarked.

Why Use Delicious?

- ▶ The concept of social bookmarking expands the utility of saving links to your machine's desktop by:
 - > Making your bookmarks to be **accessible from the cloud**, or the Internet.
 - > Allowing you to **tag the content with key words** that can help you remember why you saved it and/or help others find what you have saved. Much like geosocial networking, the value is in the metadata volunteered by thousands of users.
 - > Helping you find highly relevant content from other users by seeing how they tagged it, if they gave it a description, and what other types of content they have saved. Think of it as a **highly refined, pre-vetted Google search** with the ability to learn more about the person who saved the link in the first place.

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Social Media Playbook

Flickr

▶ *Flickr is an image and video hosting website, web services suite, and online community. In addition to being a popular website for users to share and embed personal photographs, the service is widely used by bloggers to host images that they embed in blogs and social media. It was founded in February 2004 and acquired by Yahoo a year later. It states that it hosts over 4 billion images.*

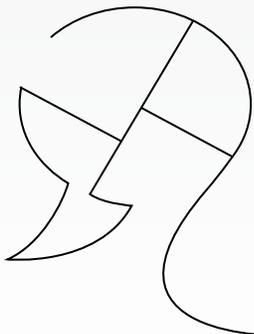
Why Use Flickr?

- ▶ **Increase the reach and relevance of your photos:** Tagging and titling your photos help them rank in Google Image searches and can increase your SEO findability.
- ▶ **Connect with like minds** that enjoy photography in general, or taking photos of certain subject matters such as birds, butterflies, food, travel, animals, cats, and more. Flickr has what is called “Flickr Groups” for users to join based on interest and Flickr Pools for photos to be pooled together based on relevance of the topic.
- ▶ **Allow your photos to be shared, embedded and blogged about:** While Facebook trumps Flickr when it comes to sheer volume, Flickr wins when it comes to off-platform sharing and embedding. Facebook is a “walled garden” that has a lot of privacy layers in place between you and photos, where as Flickr is much more open (provided users continue to allow their content to be public), allowing you to link to and embed photos as you would a video from YouTube.
- ▶ **An example of using Flickr well:** HubSpot-
<http://www.flickr.com/people/hubspot/>.

Social Media Playbook

Google Buzz

- ▶ **GOOGLE BUZZ** is a social networking and messaging tool launched in February 2010 by Google that is designed to integrate into Gmail and allows users to share links, photos, videos, status messages and comments via organized “conversations” that are visible in the user’s inbox.
Check out the official product video from Google that explains further: <http://www.youtube.com/watch?v=yi5OKIsCBio>



Why Use Google Buzz?

- ▶ **Share publicly or privately:** You can publish your ideas to the world or just to your closest friends.
- ▶ **Monitor relevant conversations:** Public conversations can be searched, just like Twitter, and provided you have a relevant group of private friends, their content can be equally valuable for industry insights and monitoring your company and competitors.
- ▶ **Inbox integration:** For Gmail users, you can have comments sent right to your inbox so it’s easy to keep the conversation going.
- ▶ **Photo friendly:** Google Buzz allows you to see thumbnails with each post, and browse full-screen photos from popular sites.
- ▶ **Connect sites you already use:** Like many sites, Google Buzz allows you to import your content from Twitter, Picasa, Flickr, and Google Reader.
- ▶ **See updates in real time:** Just like an instant message (IM), new posts and comments pop in as they happen. No refresh required.

Public conversations can be searched, just like Twitter, and provided you have a relevant group of private friends, their content can be equally valuable for industry insights and monitoring your company and competitors

- ▶ **Recommendation engine:** Google Buzz promises to recommend “just the good stuff” that is comprised of “interesting posts,” while weeding “out ones you’re likely to skip.”
- ▶ **Geosocial aspect:** Google Buzz allows you to see publicly posted “buzz” around you and tag posts with your location.



Social Media Playbook

Geosocial Networks – Foursquare and Gowalla

▶ *Geosocial networking is “social networking in which geographic services and capabilities such as geocoding and geotagging are used to enable additional social dynamics,” according to Wikipedia. In addition, “geolocation on web-based social network services can be IP-based or use hotspot trilateration. For mobile social networks, texted location information or mobile phone tracking can enable location-based services to enrich social networking.”*

Advantages Joining a Geosocial Network

- ▶ **To connect and coordinate** with users and events based on their geographic location and your interests (e.g., local restaurants).
- ▶ **To enjoy loyalty programs** offered by some venues. For example, a Foursquare “mayor” – someone who has earned their position after checking in at the same location a certain number of times – is offered special deals on food, clothing and drinks by certain venues such as a free beer by Good Hurt in LA: <http://twitter.com/goodhurt/status/1888504443>.
- ▶ **To learn more about a given area or venue:** The data volunteered by users is often helpful and insightful when it comes to what to order (or avoid) as well as which sights to see when you are visiting a city, region or street.

Disadvantages of Geosocial Networking

- ▶ Put bluntly by the blog ReadWriteWeb: “If you really feel the need to share your location with the whole world, then you have to accept the risks. This isn’t just limited to location-aware applications, though. Posting Twitter updates from your vacation also make it pretty obvious that you are not at home.”

As of May 2010, Foursquare has over 1 million members and Gowalla has approximately 500,000 members. During South by Southwest Interactive (SXSWi) in March of 2010, Foursquare boasted single-day checkin numbers surpassing 347,000 and 352,000 respectively

► **Risks include:**

> **Signaling to criminals that you aren't home:**

The site PleaseRobMe.com has since been taken down, but was posting people's Foursquare updates that indicated that they were everywhere but their homes.

> For higher profile individuals and women, it creates a **vulnerable point of access for crazed fans and stalkers.**

> **Appearing unprofessional to clients or coworkers in the event you are out late during the work week.** This may sound silly (or obvious, depending on your perspective), but checking in at a bar at 1 a.m. when you have a big client project due the next morning is likely to be viewed as unprofessional. Make sure that you are using your best judgment when participating on social media in general, and especially when you are volunteering your location.

Top Geosocial Networks

► **Brightkite:** Allows registered users to connect with their friends and also meet new people based on the places they go. Once a user "checks in" at a place, they can post notes and photos to that location and other users can comment on these posts. Users control the privacy of their updates and can choose to share them with their Twitter and Facebook accounts, while also having the option to share their geotagged photo posts to Flickr.

► **Gowalla:** Called a "geocaching scavenger hunt," you check in at various locations in a given city (their list is confined to a sort of top ten list, such as New York, San Francisco and Boston) and receive points and collect "stamps," "icons," and "pins of glory." A stamp is received when you check in a certain places. Think of them like stamps in your passport (Source: Jeff Croft <http://jeffcroft.com/blog/2009/mar/20/a-look-at-foursquare-and-gowalla/>).

Social Media Playbook

Geosocial Networks – Foursquare and Gowalla Cont.

- ▶ **Foursquare:** Location-based social networking site for mobile devices, with an emphasis on earning points for checking in and ousting the mayor of a given location.
 - ▶ **Loopt:** Provides a cell phone-based GPS sharing system that allows users to visualize one another using their cell phones and share information. Loopt also enables users to explore the world around them by connecting users with integrated content from Yelp and others.
 - ▶ **Yelp:** Business ratings and reviews, with an emphasis on local and user-generated content.
 - ▶ **Google Maps, YouTube, ÜberTwitter and others:** According to Wikipedia, “as some of the first online communities to adopt geotagging features, the Google Maps community and photo sharing communities are arguably considered early geosocial networks. Video sharing website YouTube updated its service to facilitate geotagging in July 2007.” Mobile Twitter application ÜberTwitter recently added a variety of geolocation services to its free application.
-
- ### Which One Should I Join?
- ▶ Foursquare and Gowalla are the two main competitors in geosocial networking. Many early adopters in the technology and social media space are signing up for both and seeing which platform pans out. They both launched at SXSW in 2009 and have continued to roll out new features, improved offerings, corporate promotions, and venture capital funding announcements ever since.
 - ▶ If you are looking for the platform with the most content, active users and corporate loyalty programs, sign up for Foursquare.
 - ▶ If you are looking for more functionality, better design, an elegant iPhone application and smaller, more intimate user base (for now), sign up for Gowalla.
 - ▶ If you can't decide, but want to be a part of the “next big thing,” sign up for them both and see which one you enjoy using more.

What Are the Differences Between Foursquare and Gowalla?

- ▶ **Traffic:** Foursquare is estimated to receive over twice the daily unique visitors that Gowalla does.
- ▶ **Adoption:** As of May 2010, Foursquare has over 1 million members and Gowalla has approximately 500,000 members. During South by Southwest Interactive (SXSWi) in March of 2010, Foursquare boasted single-day checkin numbers surpassing 347,000 and 352,000 respectively.
- ▶ **Partnerships:** As of early 2010, Foursquare has secured a number of top brand partnerships, including Bravo (<http://mashable.com/2010/01/31/bravo-foursquare-snags-a-tv-partnership/>), Zagat, HBO, Warner Brothers, and the History Channel (<http://techcrunch.com/2010/02/08/foursquare-mainstream-deals/>).

[com/2010/02/08/foursquare-mainstream-deals/](http://techcrunch.com/2010/02/08/foursquare-mainstream-deals/)). Gowalla's partnerships have tended to be less mainstream and with smaller brands such as Sweet Leaf Tea (<http://gowalla.com/blog/2010/03/gowalla-%E2%99%A5s-sweet-leaf-tea/>).

A complete breakdown / comparison is included below (Source: Mashable, December 2009 <http://mashable.com/2009/12/25/foursquare-gowalla/>)

Social Media Playbook

Tip Sheet: Using Social Media to Cultivate Leads

- ▶ *This tip sheet has two main points for helping companies use social media to cultivate leads and ultimately secure more business:*

- 1. Set up systems that help you listen and monitor the conversations your ideal customers are having.*
- 2. Learn to effectively engage with these customers by engaging with the social media content they are interested in.*

MONITOR/LISTEN

- ▶ The first step in social media is learning to listen before you speak.
- ▶ Social media offers a unique window into the lives and interests of prospective clients who are looking to overcome business challenges. By setting up some of these “listening” systems, you are guaranteed to find relevant conversations to observe and ultimately join. These participants have the potential to become your customers.



Listening System Tools:

- ▶ 1. **Google Alerts:** Set up individual and comprehensive (e.g., blogs, Google News, etc.) **Google Alerts** on the companies, individuals and terms that you think a prospective client is most likely to use online.
 - > Get a **“Daily Digest” email** with all mentions, versus “As It Happens” to avoid receiving a barrage of emails.
 - > Having a Google Alert allows you to **passively monitor** conversations, news stories and mentions of the prospective client that can be **great fodder for reaching out/following-up** with the them (e.g., “I happened to catch a nice mention of you in the Boston Business Journal, wanted to let you know I’ve sent it around the office and tweeted it out from [YOUR TWITTER HANDLE]. Looking forward to connecting at the end of the week.”)

- ▶ 2. Set up a **TweetDeck** search (on your



LinkedIn should be thought of as much a place to display your own credentials and connect/network with others as it is to conduct research on the companies and people with whom you are prospecting

desktop) or an in-browser **TweetGrid** window that searches on the same companies, individuals, terms as above *and* include mentions from competitors in your industry. You never know when a prospective client – or frustrated customer of a competitor – might go to Twitter to tip their hand or vent. Just be sure to not “vulture” (publicly reply on Twitter to the complaining customer). Produce an email address through a search of the person’s Twitter profile or LinkedIn account.

- ▶ **3. Use LinkedIn as a prospect research platform.** LinkedIn should be thought of as much a place to display your own credentials and connect/network with others as it is to conduct research on the companies and people with whom you are prospecting. LinkedIn should be your first research tool – even above Google – because of the level of detail it can give about the prospect, their role(s) and their

experiences (provided, of course, that the prospect has a well-filled-out LinkedIn page). Further, if you don’t yet know who your point of contact should be/is yet, LinkedIn is a great place to see what kind of titles / positions the company has and the roles for which they are responsible. Under the search bar, you can select People, Jobs, Companies (these three are the most relevant for prospecting / research) and Answers, Inbox (your personal inbox) and Groups.

- ▶ Please see the examples of company pages below. Note that it will show who you know that works there, used to work there and are connected to people who work there, in addition to giving general statistics on the company.
- ▶ For example:
 - Google: <http://www.linkedin.com/companies/google>
 - Cisco: <http://www.linkedin.com/companies/cisco-systems>
 - Microsoft: <http://www.linkedin.com/companies/microsoft>

Social Media Playbook

Tip Sheet: Using Social Media to Cultivate Leads Cont.

Support and engage in your lead's social media content

TOOLS FOR ENGAGEMENT WITH POTENTIAL LEADS:

- ▶ **Become a Fan of your prospect's Facebook page.** Look for opportunities to engage with their Wall postings. Companies often launch campaigns and share more personalized updates over Facebook (and Twitter) than they do on their more static websites.
 - > If the **prospect has a personal profile on Facebook**, proceed with caution. Get to know prospects through other, more public forums like Twitter and blogs and known professional hubs like LinkedIn first. If these interactions, as well as your interactions over email, phone, and even the web, go well then evaluate whether or not a Facebook connection makes sense.
- ▶ **Determine if Prospect has a Flickr, YouTube, SlideShare or other content-storage account** and look for ways to help promote, rate, comment and generally engage with their content.
 - > Each of these pieces of information reinforce your name, your brand, and the personal attention you are giving to something the prospect is interested in.
- ▶ **Make regular comments on your prospect's blog** that offer interesting insights, supportive comments, and additional resources.
 - > For example: "Read a another viewpoint on this same topic in the *New York Times* yesterday [LINK] and thought you might find helpful."
 - > If blog allows, register as a user and fill out complete profile with your full name, a photo (use your real photo in case you get to connect in person), email and place for your company website.
- ▶ **Promote their relevant blog content** on Twitter, Facebook and even your organization's blog.
- ▶ **Links back and mentions of the prospect's name** will likely increase website traffic and trigger alerts in their analytics section (under "inbound links") and Google Alerts.
- ▶ **Follow the prospect on Twitter.** Look for opportunities to respond to and retweet their content.



Look for opportunities to engage with their Wall postings. Companies often launch campaigns and share more personalized updates over Facebook (and Twitter) than they do on their more static websites

- ▶ **Update your social media accounts regularly.** Having a monthly schedule pre-planned will help assign your resources in the most efficient way.

IDEAL UPDATING FREQUENCY:

- ▶ **Facebook: 2 – 3 times per week maximum,** with an emphasis on going deep on each engagement.
 - > Post follow-up remarks based on what others have posted in response to you rather than starting numerous, separate threads.
 - > Best days to post are Monday through Wednesday, a peak day. Online traffic declines on Thursday, Friday and Saturday, with the lowest engagement day being Sunday. This is directly linked with access to computers at work for non-youth segments, as well as weather and holidays. Youth (15 – 24) are typically more active during nights and weekends, based on school schedules.

- > **Twitter: Post daily,** knowing that like Facebook, traffic is heaviest Monday through Wednesday. Balance the type of content you are posting: 80% should be supporting the community you are trying to engage and 20% of the content can be directly promoting and discussing your organization's goals for that week.

- > **YouTube, TwitPic, Flickr and SlideShare** should all be updated on an ongoing (ideally daily or weekly) basis with as much relevant and quality content as possible. Without these content engines your company is left with pure text on Twitter and a closed-garden on Facebook. Second only to human participation, content is going to be the most important deciding factor in customers taking notice of and interest in your organization.

FINAL THOUGHTS

- ▶ **Don't overdo it.** Engaging too often can actually be counterproductive to your efforts by annoying your prospect. On Twitter all @ messages that you post with their handle in it go directly into their public inbox and are likely to be picked up by their monitoring efforts. Aim to retweet a prospect no more than twice every 7 days.
- ▶ **Be genuine.** This is key! Make sure that what you are retweeting is something in which you are genuinely interested.



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Social Media Playbook How it all fits together

Content marketing, or inbound marketing, increasingly is becoming an effective lead generation discipline. In fact, analyst firm SiriusDecisions predicts that by 2015, more than 75% of leads will be sourced through inbound channels. We call this infographic, or framework, "The Content Grid" because it plots content and channels across the two key dimensions: who creates it, and who consumes it.

