

## 8 steps to creating a social media strategy

### Abstract

Find out how to use social media tools for business—and how to tie in Salesforce CRM.

By: Kirti Patel

With Salesforce CRM, you can run your business in the cloud, with no hardware or software to buy or maintain. And by also using social media and collaboration tools, you can join the conversations of customers, prospects, and users in the cloud. With a well-designed social media strategy, you can leverage those conversations to advance your business. Without such a strategy, you run the risk of falling behind.

The benefits of social media campaigns are extensive—from increasing customer satisfaction, to keeping tabs on the competition, to marketing your latest products. In this document, you'll get an overview of common tools. Although these tools were designed for different uses, each can serve to increase your profile and connect with prospects and customers. And because many of these tools are free, why not take advantage of them?

Once you know what tools are available, follow the 8 steps to get started with *your* social media strategy.

### Overview of social media tools

There's no escaping social media—or the news about social media. Here's an overview of the most common tools you can use to achieve your business goals.

Although the following tools weren't designed specifically for business, people use them that way very effectively. For some of these tools, salesforce.com created integration points with Salesforce CRM to make them even more useful to our customers.

- :: **Facebook** – Use Facebook to reach consumers of all demographics. With more than 500 million users globally, this tool can be extremely effective for building your brand and marketing yourself.

To get started with Facebook, simply create a business profile for your company to share company information and events. When Facebook users become “fans” of your business, they get automatic newsfeeds or other updates from your company. Facebook can be a great multiplier of your message; as users become fans, you automatically reach each user's network as well. Fans can also write on your “wall,” which facilitates ideas and discussion.

- :: **Twitter** – With Twitter, you can send “tweets”—messages with fewer than 140 characters—to all your “followers.” When these followers “retweet” your posts, it spreads your message to new audiences. That reach makes Twitter an incredible tool for making announcements or promotions and profiling your heroes.

But Twitter isn't just for outbound messaging. Many companies use it to listen in on what others are saying about them—or their competitors—and then intervene immediately. With tools such as [Salesforce for Twitter](#) from the AppExchange, it's also possible to capture leads directly from Twitter. And you can't afford to ignore Twitter's 50 million users, with new ones added daily.

- :: **YouTube** – With nearly 70 percent of the online video market, YouTube is a great opportunity to get out high-impact messages. Although YouTube first became known for funny home videos, it's an effective tool for business because visual messages are particularly engaging, with great potential for “going viral.” YouTube videos can be emailed, embedded in Web sites, or added to documents.

Use these videos for product demos, brand marketing, Webinars, and training materials. If you have a global business, consider providing videos in other languages as well. Tip: Place a lead link in your YouTube videos to eliminate some of initial lead qualification steps of demoing a

Best practice

product or service. That way, your prospect already knows about your business before you ever talk to them. Now *that's* one qualified lead.

To learn how salesforce.com uses YouTube, visit this [link](#).

- ∴ **LinkedIn** – Use LinkedIn to tap into the professional networks of your customers. As a business, you can also create a group that individuals can join to participate in discussions and to connect with other customers. And because LinkedIn is a professional networking tool, it's a great place to post job listings and corporate news, launch beta products, and promote events to your most interested users.

### 8 steps to a social media strategy

The tools discussed in the previous section are just that; they're not a strategy. To be successful, it's vital to have a plan. Here are the steps to take to make sure social media fits your business and your business plan:

1. **Create a community manager role** – The community manager will serve as your point person for all social media and collaboration activities, including evangelizing your product or business. This person will also serve as your company's official voice on social media sites and be tasked with staying on top of new capabilities and tools.
2. **Create a social media steering committee** – In addition to the community manager, define other stakeholders in your social media strategy to create a cross-functional steering committee that includes public relations, product management, customer support, and marketing. This committee should drive your social media initiatives.
3. **Define objectives** – What do you hope to achieve with your social media campaign? Each tool offers different benefits. For example, if your objective is to reduce case volume for your support team, consider extending your self-service offers by using Twitter and the knowledge and answers capabilities of Salesforce. Other objectives might include increasing qualified leads or building customer loyalty or awareness. Define very specific objectives and then choose the tools that can help get you there.
4. **Decide on success metrics** – The true impact of social media can be hard to measure. Social media tends to be word of mouth or "viral," which is challenging to measure quantitatively. However, many social media sites offer fairly robust analytics. For example, YouTube lets you track video views by number and geographic region. And counting the amount of activity on your Twitter feeds or Facebook posts gives you a good idea how those programs perform. As part of your plan, decide what metrics are important, set your goals, and determine how to track results.
5. **Set up social media guidelines** – In most cases, you want to encourage many employees to participate in your social media campaigns. Be sure to establish guidelines that specify the "do's and don'ts" of participating in online communities. Information shared through social media sites is public. Before employees start interacting with customers and prospects, be sure everyone knows that financial statements and private information are off limits for your community sites.
6. **Create easy-to-remember URLs** – To encourage customers and prospects to participate in your communities, make it easy to access your links. With most social media tools, you can select a personalized URL. When setting up your Facebook or Twitter accounts, make sure the URLs are a natural extension of your businesses Web site and that they'll work in emails and marketing collateral. For example, Salesforce users and customers can access our Facebook page with the URL [www.salesforce.com/facebook](http://www.salesforce.com/facebook).

7. **Be active** – The volume of customer interaction through both external and internal tools is an important success indicator for your social strategy. To build and keep followers, update content—including comments, status, and tweets—regularly to keep it fresh and to interact with your users. Not responding to posted messages has the potential to not just damage your social media programs, but your company as well. Check out the Salesforce CRM workflow tools to make sure the right person gets every message.
8. **Be flexible** – Social media and strategy are moving targets; new functionality and new tools are introduced all the time. Review and revise your social media plan regularly to keep up with—and make the most of—those changes. To keep up with news from salesforce.com, bookmark the [Salesforce blog for social media](#).

#### For More Information

Contact your account executive to learn how we can help you accelerate your CRM success.

**Corporate Headquarters**  
The Landmark @ One Market  
Suite 300  
San Francisco, CA, 94105  
United States

1-800-NO-SOFTWARE  
[www.salesforce.com](http://www.salesforce.com)

**Latin America**  
+1-415-536-4606

**Japan**  
+81-3-5785-8201

**Asia/Pacific**  
+65-6302-5700

**Europe, Middle East & Africa**  
+4121-6953700



Copyright ©2010, salesforce.com, inc. All rights reserved. Salesforce.com and the "no software" logo are registered trademarks of salesforce.com, inc., and salesforce.com owns other registered and unregistered trademarks. Other names used herein may be trademarks of their respective owners.

BP\_SocialMedia\_2010-05-17