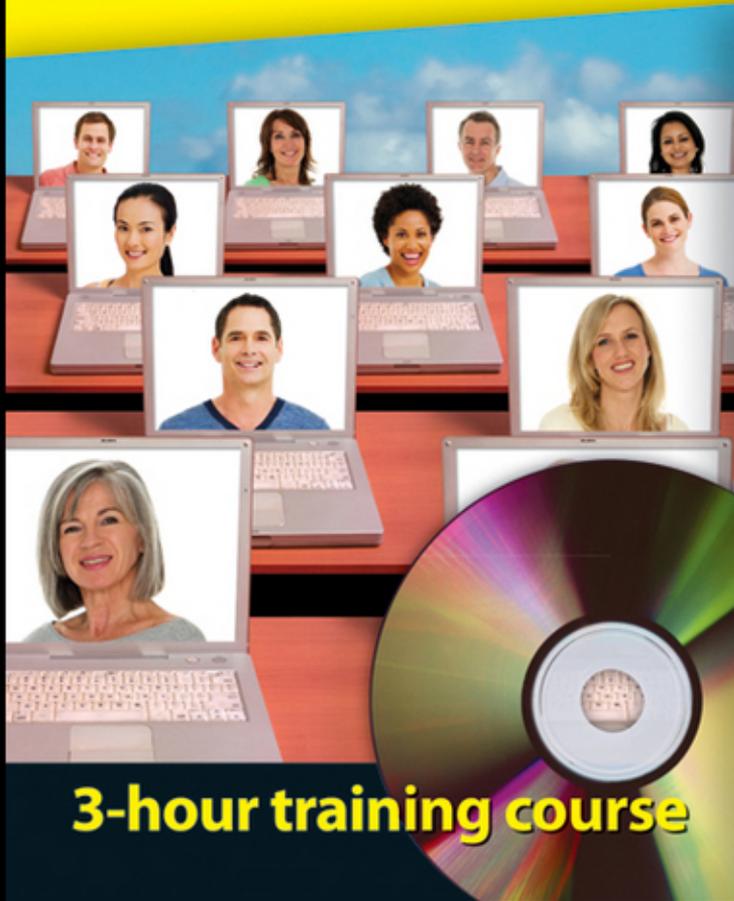


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Lesson 2: Creating Your Strategic Marketing and Management Plan

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Lesson 2

Creating Your Strategic Marketing and Management Plan

6 Ways to Supercharge Your Writing



Have you ever gotten so caught up in a deadline (or your own expectations) that writing anything at all felt ... *uncomfortable*?



- ✓ Know how marketing in a social environment is different from marketing offline.
- ✓ Manage your time effectively to be more efficient.
- ✓ Define your customers and find out where they hang out online so that you can focus your marketing efforts.
- ✓ Create a social press release that puts your business ahead of the game.
- ✓ Use a calendar to schedule your content posts and social tasks.



- 1. Do I need to market differently just because I'm using a social account?**
Absolutely, if you want to gain new customers! See page..... 38
- 2. I have a local business with physical products that need to be mailed. Are there social sites best suited for my business?**
There's a chart for that. Check out page 45
- 3. Can I send press releases like I always have in the past?**
You handle social press releases differently. See page 48
- 4. How do I coordinate all these new tasks required for marketing across the different media platforms?**
Create an editorial calendar. See page..... 52
- 5. Isn't posting to all these different social accounts a drain on my resources?**
Not if you use a management system! Go to page..... 55

Marketing is moving from push-based strategies used in many offline companies of the past into an attraction-based (or pull-based) marketing strategy. This shift may be old news for you, but if you're just now getting online in a social environment, learning how to market socially is an important lesson to learn to be successful and prosperous going forward. Once you have this new attraction-based mindset, you can move on to creating a strategic plan — the “what” to do and “when.”



Offline marketing still has a big place in the overall marketing strategies you create for your business, but adding some new online strategies will add a freshness to the plan. Social media can open doors to a new audience, and new sources of revenue, if done well.

Although some portions of this lesson might seem a bit elementary for where you are in your business, I recommend that you go through it step-by-step to help you focus on your potential customers currently using social media. By the end of this lesson, you should have at least a first draft of a marketing plan — that will be your guiding light as you open your new social accounts — plus a social press release and a management system.

Putting Together Your Marketing Plan

Before you dive into creating a marketing plan, you must understand how to market in social media and then consider your own readiness to do so, identify your ideal customer, and determine which social platforms to target. After completing these preparations, you will be ready for the real meat of this lesson, and that is creating a cohesive marketing plan across the social media platforms. To that end, this section covers first the plan preparations and then the plan creation.

Understanding how to market in a social environment

Marketing in a social media environment is a lot different from the way things were marketed back in the 1990s or even early 2000s. Back then, push-based strategies were used, in which companies tried to find ways to get in front of someone to show them an offer. All TV commercials and radio commercials are push-based. As consumers, we haven't asked for them; they're just put in the path of whatever it is we're doing or enjoying.

Consider how consumers interact with businesses today. You probably researched your last purchase online, and chances are you asked your online friends whether you should buy it. You probably read a few posts or articles about their business and what they offer. Maybe you even read through a few of their tweets or posts on their Facebook Page.

These attraction-based strategies are the new way to advertise, and they enable you to know you're being helpful and adding to the online conversation (which increases your search engine optimization). Attraction-based strategies reward social customers and are quick with online customer service (word-of-mouth optimization). So when your customers go searching for a company to solve a problem (either on Google or on a social account), they find you, not someone else.

Additionally, right now there's a big swing toward geolocation-based social media marketing. One of your goals should be to combine what you do already in the real world (offline) and what you will do with these new geolocation social accounts in a complementary way. So as you move through this lesson, coordinate your online efforts with what you're already doing offline.

Obviously, to market your business successfully in a social media environment, you need the know-how, the down-to-earth functional action steps you take to market in a social environment. But you also need the right mindset, one that embraces these guiding principles of social media marketing:

- ✓ **Giving great content freely.** You might have to draw the line between free content and that which is for paying customers, but in general, the more you can give out freely, the more you help boost your attraction juice.

LINGO

Geolocation is the identification of the real-world geographic location of an Internet-connected computer or mobile device, and it can include country, city, postal/zip code, latitude, longitude, and time zone. In other words, social platforms that use geolocation can tell where you are, based on the phone in your pocket.

Putting Together Your Marketing Plan

- ✓ **Answering questions freely.** No more only having toll-free phone numbers (unless your main demographic is over 60) and making potential customers sit on hold forever. Using a Facebook Page to answer customer questions in a completely open environment is a good example of modern marketing in action.
- ✓ **Sharing business-related resources freely.** When you retweet or share content — especially in LinkedIn — you're showing that you're in line with this new way of doing business that's much more transparent and helpful.
- ✓ **Promoting yourself in an authentic way when appropriate.** It goes without saying that you need to be ready when someone *does* ask for your website or product name.
- ✓ **Having connections in place so people can click your name and go to the best space for deepening the connection.** These links can direct customers to pages that either generate revenue, like a link to your Facebook business Page e-commerce tab or your company website, or engage in a more personal way, like a link to your personal LinkedIn profile.

To help prepare you for marketing in a social environment, consider these three tools:

- ✓ **Social Media Marketing Mindset quiz:** Use this quiz to see whether you're developing the best mindset toward marketing in a social environment. If you find that you answer more often with Not Comfortable than Very Comfortable, you need to spend more time studying attraction-based marketing principles and why they're so important to social media marketing today.
- ✓ **Daily Tasks checklist:** This checklist takes you through the actual mechanics of day-to-day marketing tasks so that you can see how ready you are for those.
- ✓ **Knowing Your Customer worksheet:** You must know who your customer is; having a general idea isn't enough. If you want your marketing campaign to be successful, you need specific details. This list of questions will help you clearly define the customer you're targeting.

GO ONLINE

No one else on the planet gets attraction-based marketing like Seth Godin. Read his blog posts at <http://sethgodin.typepad.com>.

In the next pages, I describe and further explain each of these tools, but you can also download and print a hard copy of each. Go to www.dummies.com/go/socialmediamarketingelearningkit to find the PDFs.

Social Media Marketing Mindset quiz

Use these ratings to indicate how comfortable you are with the following statements:

1 = Not comfortable at all

2 = I'll do it, but it feels odd

3 = I'm game to try

4 = This feels doable

5 = Very comfortable

___ I am open to sharing the *personal side* of my business/product.

___ I can give advice *freely without a pitch* to my services.

___ I am willing to follow (connect with) relevant people within my business niche.

___ I can *engage in public conversation* with people (in my niche and out) online.

___ I am *willing to learn* new ways of marketing, and accept that they might be more appropriate than the old ways of marketing.

___ I can *take the time* to develop an online reputation as being the expert in my field by answering questions, giving advice, and sharing content freely.

___ I am *willing to develop* my online systems to allow people to naturally click through to either my website or store to purchase products or services (e-mail signature links, social account bio links, and so on).

Add up your numbers and see where you are.

If you're in the 7-14 range, you'll need to take social media marketing slowly.

If you're in the 15-21 range, you can succeed by focusing on a few tasks.

If you're in the 22-28 range, you can try a few new techniques to see whether you like them.

If you're in the 29-35 range, you're ready to dive right into social media marketing.

Putting Together Your Marketing Plan

Daily Tasks checklist

Check the things you — or other people in your company or outsource to independent contractors (your team) — are prepared to do as you enter social media marketing:

- ___ I have time in my daily schedule to learn and implement new tasks, or I have a team in place with time in their schedule to learn and implement.
- ___ I am willing to rewrite marketing copy to reflect attraction-based marketing principles, or have a team that can.
- ___ I am willing to take the time to create videos, if they are congruent with what I do to support my business.
- ___ I am willing to personally sit and type answers and engage in online conversation with people daily on my new social accounts.
- ___ I have time in my schedule to read online articles, blog posts, and watch videos related to my field, and make comments on them, or have a team that can collect them for me so I can spend my time making comments.
- ___ I am willing to try to design online marketing strategies that are fun, engaging, interesting and memorable, as suits my field, or have a team that can.



If you simply don't have the time for social media marketing, look into outsourcing. Find a social media marketing expert who truly understands your company. Consider contracting social media to someone who already works for you, as that person wouldn't have a learning curve for understanding your business goals.

Knowing Your Customer worksheet

You've figured out whether you have the mindset for social media marketing and the time to devote to it. The next thing you need to know before you create a marketing plan is who your customers are, which involves knowing their demographics, what they're looking for, and what their online habits are.

In this section, I further discuss these three aspects of your customer because having a general idea isn't enough. If you want your marketing campaign to be successful, you need specific details — details you can garner by asking yourself the following questions from the Knowing Your Customer worksheet:

1. What are the age and demographic of your ideal customers?
2. What are these customers looking for from you — coupons, deals, advice, tutorials, how-to, inspiration, technical information, community, and so on?
3. How often are they online — hourly, daily, weekly, only on the weekends, only after the kids are in bed?
4. Where do they go first online — Facebook, Twitter, LinkedIn, YouTube, Google searches, or e-mail?
5. On a scale of 1 to 5 — with 1 being least tech savvy and 5 being most tech savvy — where do they rank?
6. Do these customers do research online and then buy offline, the other way around, or all one way?
7. Do your ideal customers belong to any existing online or offline communities — book clubs, buying clubs, community-based groups, business groups, church or service groups, school or alumni groups, or social media groups?

Demographics

You may find it helpful to categorize your customers according to the decade in which they were born: Boomers, born 1946–1964 (lived through the 1960s; not digital natives, so to speak); Generation X, born 1960s–1970s (children of the Boomers); Generation Y, born 1982–2000 (the Millennials; confident, connected, and open to change); and Generation Z, born 1990–2010 (also known as the Internet Generation; considered *digital natives*, meaning they take to the Internet like ducks to water). Other demographic considerations include where your customers live and their gender, education, interests, and socioeconomic situation.

GO ONLINE

This topic of generational differences is extensive. For a detailed explanation, search *William Strauss and Neil Howe* to find their work defining the differences between generations. Also check out <http://pewsocialtrends.org/series/the-millennial-generation> for a deeper understanding of Generation Y.



If you could roll up all your customers into one person, could you draw what that person would look like and give her a name? Seriously. Consider the demographic of your ideal customer and then give this customer a name, age, education level, sex, monetary status, and, if appropriate, location. Get out your artistic skills and either draw her or find a picture in a magazine that represents her. If you have several different types of customers, do this for all of them. Art projects are good for adults, you know. I have made this exercise a bit playful, but all (successful) companies go through this exercise in some shape or another.

Putting Together Your Marketing Plan

What customers want

If you've been in business for awhile, you can use sales data to help you refine what your customers want from you. If this is a new venture, you'll need to dig a little deeper and use search tools to get a clearer picture of what people are really looking for — your niche.

✓ In your field of expertise, what are people (really) asking for?



Be careful here. What people are asking for isn't necessarily the same as what you want to give them. But if you want people to give you money in exchange for something, you might want to present them with what they really want!

- ✓ **Do you have a product or service that satisfies that request?**
- ✓ **Are those products or services available online on your website?**
- ✓ **If you don't have a product or service that satisfies that request, does someone else have one, and can you be an affiliate for that product or service?**

GO ONLINE

To establish an affiliate program, make sure you know what your customer wants first, and then research the top-selling product on Commission Junction (at www.cj.com) in your niche.

Online habits

Matching your marketing to your ideal customers' online behavior will help put your message in front of them when they're actually online. Questions in the Knowing Your Customer worksheet can help you define your customers' online behaviors.

GO ONLINE

Here's a list of tools you can add to your website. (Geeky alert is at a level 10, so if you don't know how to add these codes to your site, have your IT professional or webmaster do it.)

- www.4qsurvey.com: This free tool is a whole-site exit survey.
- www.crazyegg.com: This tool shows you where people click the most on your site with a nifty visual heatmap overlay. A free, 30-day trial is available.
- www.kissinsights.com: This is a page-specific, two-question, minimally intrusive survey that's free for simple use. You've probably seen these pop up on other websites. They ask a few questions about how you use the site.
- www.kissmetrics.com: This tool is fairly advanced and more expensive (with a \$149 per month minimum), so it's for those of you with bigger budgets.

You can find out about many of these tools and how to use them effectively by listening to an interview with Avinash Kaushik (probably the best analytics blogger). His web address is www.kaushik.net/avinash, and the hour-long interview worth listening to is here: <http://mixergy.com/analytics-avinash-kaushik-interview>.



Now that you have a clearer idea of your customers, you need to see what they're searching for online and then add that information to what you already know about your potential customers or clients. Write down five or so keywords and phrases that you think are important words for your business. (If you develop iPhone apps for children's games, for example, you would write down a list that looks like this: iPhone, iPad, iPad apps, iPad games, children's games, games for kids, iPhone apps for kids.) Check those keywords in Google's Keyword Tool (as shown in Figure 2-1) to see what words and phrases people are using for online searching, and Google Insights to see in what part of the world they reside. Also look them up using a search on Twitter.

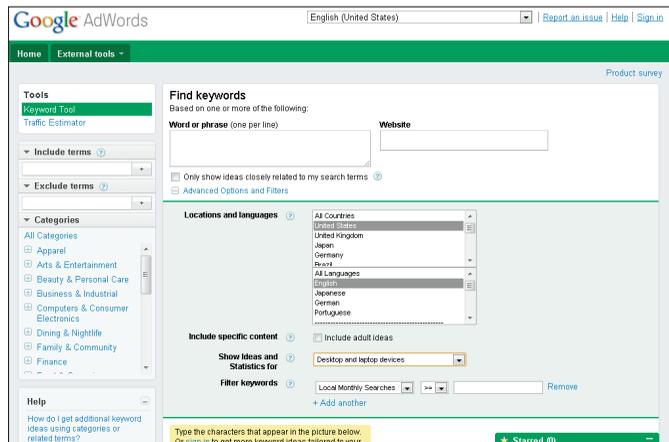


Figure 2-1

Finding the best social platforms for your niche

Can you feel the plan building? You have defined and refined your customers and know what they need. Now you need to figure out where you should hang out to meet them. In Table 2-1, I indicate how to match the conditions of your business to your customer's needs.

Table 2-1 Business Conditions and Customer Needs

<i>If . . .</i>	<i>Then You Need . . .</i>
Your business has to be done in person.	An appointment-friendly social site. If you conduct a lot of business via phone or the Internet, you can target social sites that are necessarily appointment-friendly.
Your business relies on customer reviews.	A site that's known for its sharing abilities and high level of customer interaction abilities.
You mail products regularly.	A site that allows for private messages or easy customer service requests. Otherwise, any social site will work for you.
Your business caters to tech-savvy customers.	A social site that doesn't have to explain itself too much. If, instead, your customers aren't so tech-savvy, you need a social site that has an interface that connects them to a human to answer questions very quickly or has a user-friendly Help section.

In the following list, I detail which social platforms are best suited to meet your specific needs, as identified by the conditions in Table 2-1. Note that I'm offering my general opinion on these platforms. These designations can change based on the profile of your customer.

- ✔ **Twitter:** If you have discount codes and coupons, consider putting Twitter at the top of your social list to develop. Twitter has a great interface for giving codes quickly that can be found by huge amounts of people using hashtags.
- ✔ **Facebook:** If you have customer reviews or lots of positive customer feedback, consider putting Facebook at the top of your social list to develop. Facebook's posting interface allows for uploading of images and video from your happy customer connections.
- ✔ **LinkedIn:** If you need to set up an appointment and have a conversation quickly around that appointment, consider LinkedIn, as it has an

COURSEWORK

Don't worry if you don't get what each social account provides for you right now; you'll get that as you go through the marketing lessons for each platform. For now, you should be inspired to look at how social accounts can help your marketing efforts, giving you a framework to consider as you work through the lessons. Take a minute now to write down a few ideas of your own based on the examples provided in this topic.

easy interface for creating short private messages. You can also use LinkedIn's Profile Organizer (available through a LinkedIn subscription plan only) to add appointment information on a contact's profile that only you can see.

- ✓ **YouTube:** If you have customers that really need to view your tutorials, YouTube is the best place to start. You can always post these videos on the other sites, but because YouTube is the second largest search engine, it's the place to start.

Building your social media marketing plan

A social media marketing plan isn't an island unto itself. You also need to gather your offline plans, too. Everything you do to market your product or service online and off needs to coordinate and complement the other. For example, if you have a seasonal event that you traditionally buy newspaper ads to promote, make sure you put a Facebook icon and your Facebook Page address in the ad.

As you create your plan, make sure the different components are on the platform best suited to that component. Table 2-2 lists some popular social media marketing ideas and identifies which platforms lend themselves to that kind of presentation.

Table 2-2 Marketing Elements and Media Platforms

<i>Marketing Element</i>	<i>Platforms</i>
Coupons	Twitter and Facebook are the best services to use to distribute coupons.
Tutorials	Use YouTube to offer tutorials and then post links to them on Twitter and Facebook.
Contests	Use Twitter, Facebook, and/or YouTube. (You need to check the contest rules for any site you use, but especially for Facebook and YouTube.)
Webinars	You can also host your webinar on Facebook. Make sure to announce your webinars on all your social sites.
White papers	Use LinkedIn first to promote any white papers and then post links to them on Twitter and Facebook.
Free samples	Use Twitter and Facebook to announce freebies, and YouTube to show what they are.

Putting Together Your Marketing Plan

Marketing Element	Platforms
Interviews	Announce your interviews on all of the services. Use Facebook to host and record a live interview, and use YouTube to host the final video.
Newsletters	On the newsletter, include icons that link to all your social accounts, and announce your newsletter on all of your social accounts. Post the link to your e-mail sign-up page or directly to the hosted version of the latest newsletter.
Advertisements	Add a Facebook icon to your print or TV advertising with text inviting viewers to like your business Page. Include the name of your Page in your radio ads and invite people to go there for exclusive Facebook discounts.

The goal is to figure out the best formats and focus on those. For example, if you have a business that sells discount coupons for local restaurants, your typical customer may be 39-year old Sally, who

- ✔ Is a single mom with two junior high school kids.
- ✔ Has a solid job.
- ✔ Is college educated.
- ✔ Looks for advice, tutorials, and community.
- ✔ Is online daily at lunchtime: She goes to Facebook first, and then to Google to search for online shopping deals.
- ✔ Is geek level 3.
- ✔ Researches online and buys offline most of the time.
- ✔ Belongs to the local Chamber of Commerce.
- ✔ Volunteers with a local women's business group and attends a book club once a month.

And your marketing plan (this is a really short, condensed plan) could include the following:

- ✔ Facebook-centric marketing
- ✔ Hard-copy notices in the local paper and in the windows of the local businesses with your Facebook Page address

- ✓ Coupons on your Facebook Page daily before noon
- ✓ Pictures of participating restaurants on Facebook and in tweets
- ✓ Links to Facebook
- ✓ Day-specific deals with offline promotion

Creating Social Press Releases

I think everyone understands what a press release is. Traditional businesses have used them, well, forever! In the past, you would create a press release and send it out to your professional PR company, which would send it to media outlets. Now, with social media, you can send out a social press release yourself and potentially have any number of media outlets see your posts directly.

Think of a social press release as the traditional press release's short, smart, geeky cousin. Seriously. Social press releases are

- ✓ **Short:** Just five paragraphs.
- ✓ **Smart:** Loaded with your searchable keywords.
- ✓ **Geeky:** Shared online.

Making it short: Fitting key content into five paragraphs

Because you'll write and host your press release either on your website or blog (or your Facebook Page, discussed further in Lesson 4), the announcement should be no longer than approximately five paragraphs plus an image. Make sure your press release also includes the following:

- ✓ **An image:** If your release is about something that doesn't have an innate image, use one that grabs the attention with either a play on words or something humorous.

COURSEWORK

Using the information you collected by doing the activities on the previous pages, create a first draft of your social media marketing plan: Identify where and what kinds of marketing elements you plan to put on each of the four social platforms and what your traditional marketing elements will be. The two should create a cohesive, engaging whole.

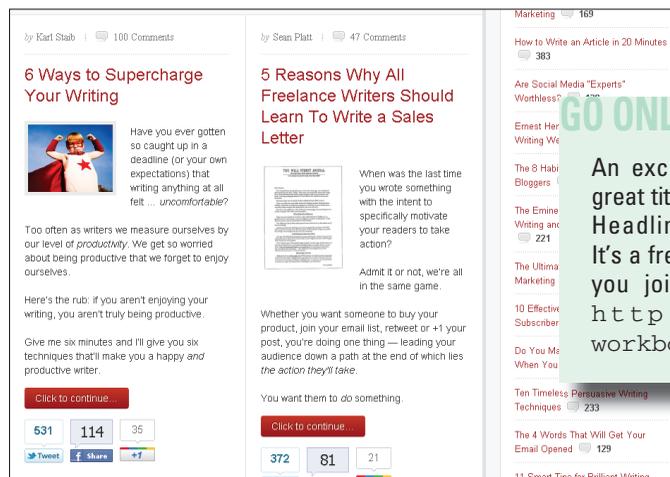
- ✓ **A helpful attitude:** Make sure you have the attitude of solving someone's problem as you write the post. Notice that the whole approach to writing the press release needs to be more like a blog post in style.
- ✓ **Enthusiasm:** If you're celebrating something great in your business, then really play it up with pictures of the party or a recording of a dedication speech, or an interview with a key developer in your company.

Making it smart: Including keywords in titles and elsewhere

For your social press release to be smart, you need to place keywords, ideally the keywords people would use to search for you and your business, in two places: The title and in key places within your five paragraphs. Don't overdo it, but the post needs to be clear, concise, and authentically full of your keywords.

Getting the keyword in your title

The title also needs to include the benefit to the user. The best titles are under 100 characters long so that they'll fit in a tweet (140 characters). Can you include a number in the title, too? Turns out adding a number (as a numeral) piques people's curiosity. Here's an example: "5 Ways to Cut Costs in Advertising!" A couple more examples are shown in Figure 2-2.



GO ONLINE

An excellent guide to creating great titles is Chris Garrett's "102 Headline-Writing Formulas." It's a free PDF that you get when you join his e-mail list here: <http://socialmediaworkbook.com>.

Figure 2-2

Making your content keyword rich

The key to including keywords in a smart way within your text is *keyword prominence* (getting those main keywords inside the first two paragraphs) and *keyword proximity* (getting the keywords close to each other).

Making it geeky

When you have a social press release ready to go, you can use what I call the “post once, enjoy many times” system by using your HootSuite account to post to Twitter, your Facebook Page, and your LinkedIn account at the same time. Or you can post your social press release directly to your social accounts one at a time. I discuss using HootSuite as a great time management tool at the end of this lesson in the section, “Creating a management system for your social accounts.”



One of the many ways to promote a press release online is to post it individually on each of your social media accounts. If you go this route, make sure you post your social press release on your blog or as a note on your Facebook Page first. Then take that page’s URL to use for the link in these social-specific posts.

Table 2-3 shows a few platform-specific tips (for more details on all these posts, head to the platform-specific lessons later in this book) for posting your social press releases.

Table 2-3

Posting a Press Release

<i>Platform</i>	<i>Posting Tip</i>	<i>Examples</i>
Twitter	Include # in front of your main keyword in the press release title and add the @username of a key enthusiast of yours asking for a retweet (RT).	“Your #Bird Asked for It (yes it did) http://birdPR.com @phyliskhare we love it when you share our tweets!”

EXTRA INFO

Google searches the first two paragraphs, so getting keywords in early is a good thing. But don’t overcrowd your press releases — if Google believes you’re using too many keywords, it won’t display your social press release in its search results.

EXTRA INFO

If you know you don’t have time to create your own posts for social media, and you know you’ll end up outsourcing this task, check out www.prweb.com or www.marketwire.com. If they line up with what your business needs, great; otherwise, finish reading this book and make a decision as to which system works best for you and your business.

Platform	Posting Tip	Examples
Facebook	Post the link to the press release in your status update. Then post an engaging status update that touches on the topic of the press release, following it up with a comment to that post that includes the link to the press release. Post it a second time about 6 hours later.	First, post with the link, like this: "Your bird asked for it - yes it did - http://birdPR.com ." Second, post a teaser, like this: "Did you see what your bird asked for? I had to laugh." Then add a comment to that second post, including the link, like this: "You can find the whole story here: http://birdPR.com ."
LinkedIn	Post the press release directly on your profile and as a promotion in a LinkedIn group.	
YouTube	Create a slide show or video of your press release (get creative here) and upload it.* Also, post a bulletin.	

**Make sure you include the keywords in your post in the keyword and description section of the video page.*

COURSEWORK

Create a draft social press release that's just five paragraphs or fewer. Then underline your keywords. Are the main ones inside the first two paragraphs? How close are they to each other? Can you rearrange the words to bring keywords closer together in the sentence? Rewrite the press release until you're satisfied and then save it to post later to your social accounts.

Getting Organized

Being organized in a social media world ensures you have plenty of time to accomplish all of your social media marketing goals. A business editorial calendar can help you sort out which things to post to which social platforms, in addition to helping you identify the main things you want to promote about your business and (naturally) scheduling your tasks. So how do you get all this posting done? By using a management system such as HootSuite. One of the great features of HootSuite is that you can create a single message that you can then post to all your accounts, which is a real timesaver.

Creating an editorial calendar

A business editorial calendar can help you organize through time a series of topics to address through blog posts, tweets, and items to share. Any large, well-known guest blogging site uses an editorial calendar to schedule guest bloggers. In this context, I tell you how to create one for *your* business to help you save time and hopefully help create a sense of order in this ever-expanding social media marketing world.

Take it from me: If you don't create an editorial calendar for your social marketing tasks, your efforts will be weak and nonproductive. An editorial calendar offers these benefits:

- ✓ **Focus:** It keeps you focused on why you're here in the first place.
- ✓ **Branding:** It keeps you in front of your audience in a consistent way, to maximize branding.
- ✓ **Simplicity:** It simplifies your life considerably when you look at all the things that need to happen in promoting a business.

Enough reasons to create one? I thought so.

Any calendar you use should offer the capabilities shown in Figure 2-3.



If you are a solo-preneur, you can create the editorial calendar by yourself. If you have a team, you'll need to gather them around the table (or virtual table) and hammer the editorial calendar out together.

My version of an editorial calendar involves two steps:

- ✓ **Define your topics.** Write down a list of the main things you want to promote about your business. If you have products, include the products and their features or have your product brochures handy. If you provide a service, include the benefits of your service individually. Add any topical news events that coincide with your niche on a regular basis, including holidays that are important to your business and any product releases.

LINGO

A **solo-preneur** is an entrepreneur who wears all the hats for marketing, admin tasks, technical expertise, and dog walking.

GO ONLINE

If you use WordPress for your blogging platform, there's a great plug-in to create an editorial calendar on your dashboard. It's called Editorial Calendar, and you can find it here: <http://wordpress.org/extend/plugins/editorial-calendar>.

Schedule tasks.

Set a recurring schedule.

The screenshot shows the Google Calendar 'Creating' interface. At the top, there's a navigation bar with 'Gmail', 'Calendar', 'Documents', 'Photos', 'Reader', 'Web', and 'more'. Below that is the Google logo and a search bar. The main form includes:

- Buttons: 'Back to calendar', 'SAVE', 'Discard changes', 'Delete', and 'More Actions'.
- Title: 'Creating - Management Systems'.
- Date and Time: '8/15/2011' from '9:00am' to '10:00am'.
- Repeating: 'Repeat: Weekly on Monday'.
- Event details: 'Find a time'.
- Where: A text input field.
- Calendar: A dropdown menu showing 'iPhone Life Editorial + Social Tasks'.
- Created by: 'phylliskhare@gmail.com'.
- Description: A text area containing sections on 'Hoot Suite', 'TweetDeck', 'Editorial Calendars', 'Outlook', and 'Google Calendars', along with URLs and a brief description of an interview.
- Guests: 'Add guests' section with 'Enter email addresses' and 'Add' buttons. Below it, 'Guests can' options include 'modify event', 'invite others', and 'see guest list'.
- Event color: A color selection bar.
- Reminders: 'No reminders set' with an 'Add a reminder' link.
- Show me as: Radio buttons for 'Available' and 'Busy'.
- Privacy: Radio buttons for 'Default', 'Public', and 'Private'.

 Lines from the surrounding text point to various parts of the form: 'Schedule tasks.' points to the title; 'Set a recurring schedule.' points to the repeating options; 'Categorize your tasks.' points to the 'Calendar' dropdown; 'Include topics and descriptions.' points to the 'Description' text area; and 'Invite others.' points to the 'Guests can' options.

Categorize your tasks.

Invite others.

Include topics and descriptions.

Figure 2-3

- **Schedule your tasks.** Schedule time for each of these tasks: writing content-rich posts, tweets, status updates, and blog entries for posting later (you'll add your topics to this time slot in your calendar), posting (either in real time or putting the posts into a scheduling system), commenting (publically admire good blog posts, Facebook updates, LinkedIn posts, and tweets by other people that somehow connect to your business niche), and congruently socializing — that is, having fun!

Yes, scheduling having a good time online is the purpose of that last task, as long as it connects back to your business niche. Twitter chats are great for this (more on those in Lesson 3) as are playful comments on Facebook and YouTube.

Table 2-4 outlines common schedules for social tasks.

Table 2-4 Examples of Social Task Schedules				
Type of Schedule	Creating	Posting	Commenting	Socializing
Light	1–2 hours weekly	1 hour weekly	1 hour daily	2 hours weekly
Medium	2 hours twice weekly	2 hours weekly	1 hour daily; 2 hours daily on high news days	½ an hour daily
Heavy	1 hour per day	1 hour per day	2+ hours per day	1 hour per day
Full-time (bordering on obsessive)	2 hours per day	2 hours per day	4 hours per day	All night long (You must not have kids or a spouse!)
Your schedule				



If you don't use a calendar management system, you might find that you're doing all of the tasks all day long. You need a plan, and you need to stick to it. I'm typing this to myself, too, as it's really easy to fall into the trap of obsessively being online (there are so many incredible people and projects to read about and all those videos on YouTube).



I like to include a time management schedule with an editorial calendar because the two seem to go hand-in-hand to me. You don't need to actually schedule exact times on your calendar for your social tasks, but I highly recommend trying. So as you identify how much time a week or day you're going to devote to the different social tasks, take it a bit further by identifying the days and, where possible, times for those tasks. For example, maybe you decide to write on Mondays, post on Monday nights, comment daily from 5–7 p.m., and so on. Table 2-5 shows an example schedule.

<i>Day</i>	<i>Writing</i>	<i>Posting</i>	<i>Commenting</i>	<i>Socializing</i>
Monday	10–3 p.m.	4–5 p.m.	5–7 p.m.	
Tuesday			5–7 p.m.	
Wednesday			5–7 p.m.	
Thursday		10–11 a.m.	5–7 p.m.	
Friday			5–6 p.m.	6–8:30 p.m.
Weekends				10–12 p.m.

Creating a management system for your social accounts

Many systems claim to simplify and manage your social accounts; some are free, some cost lots of money. Some systems are built for small businesses, some for large corporations, and some for compliance-regulated industries. It might seem a little bit like a one-trick pony to talk only about HootSuite as your social management system. Certainly you could consider its direct competitor TweetDeck (www.tweetdeck.com, which is owned by Twitter itself), and lots of services can schedule tweets, such as Buffer (<http://bufferapp.com>), Timely (<http://timely.is>), and others. However, HootSuite has so many features rolled into one that it's hard not to extol its awesomeness.



TIP If you're part of a regulated industry (like many financial planners are), you might need to look into other systems, such as Socialware (www.socialware.com), that are management systems built to keep your social posts compliance-happy.

The social management system I use and recommend is HootSuite. I like it because

- ✔ **There's a Free version.**
- ✔ **The Pro version is team-friendly.**
- ✔ **You can schedule posts.**
- ✔ **The built-in analytics are robust.**
- ✔ **It has a great mobile app for all operating systems.**

Before you can use HootSuite to simplify your social media life, you naturally have to open a HootSuite account, if you don't already have one. Next, you must add your social accounts to it. After you do those two things, most of the daily posting to Facebook, Twitter, and LinkedIn is done on one dashboard, and you can monitor all your accounts from any computer.



Currently, HootSuite connects with Twitter, Facebook (both personal account and business Page), LinkedIn (personal account), Ping.fm, your WordPress site, MySpace, Foursquare, and Mixi (social networking site in Japan). I'm hoping YouTube will be added soon. You can add Foursquare (a social, geolocation-based, check-in site that I discuss in Lesson 7), if you'd like.

Opening your HootSuite account and adding social accounts to it

Once you have opened your account, make sure you download the HootSuite apps on your mobile devices. They have an especially nice iPad app. You'll see those options presented to you after you open your account, which you do by following these steps:

1. Go to www.hootsuite.com from your computer and click the **Sign up Now** button, as shown in Figure 2-4.



Figure 2-4

2. Decide if you need the **Basic (free)** or **Pro (\$5.99 per month)** version and click the appropriate button.

If your new social accounts are only with Twitter, Facebook, and LinkedIn (no YouTube integration yet) and you don't have team members who need to access your accounts, you can use the Basic version. I suggest signing up with the 30-day free trial of the Pro version to see if you need it.

3. Fill in all fields, as shown in Figure 2-5.

You'll need to choose your language, enter your e-mail address and full name, choose a password, confirm the password, and select your time zone.

4. Click Create Account.

The next thing you'll see is a screen that will prompt you to add your social accounts (Twitter, Facebook, and so on).

Figure 2-5

HootSuite is an empty box until you add your social accounts. When you have an account with Twitter, Facebook, and LinkedIn, you can add them very easily. If you create more Twitter accounts or create more Facebook Pages, you can add them this same way each time.

When you first open your account, HootSuite prompts you to add your accounts — just follow those prompts. But if you want to add them later, follow these steps.



1. Go to www.hootsuite.com, log in, and click the Home icon at the top-left corner of your HootSuite application; then select Settings → Social Networks.

2. Click the Add Social Network button shown in Figure 2-6.

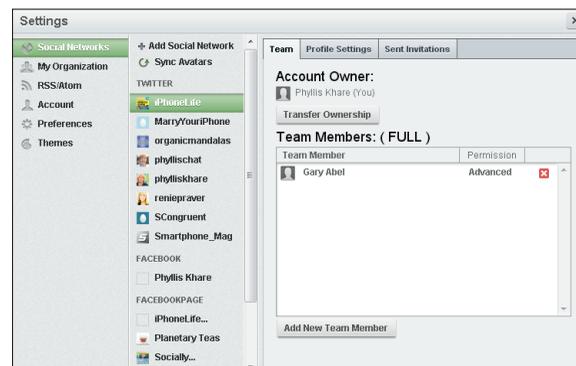


Figure 2-6

The Add Social Network box appears, as shown in Figure 2-7.

3. Click the Twitter icon on the left navigation list; then click the Connect with Twitter button.

A new authorization box displays. You need to authorize HootSuite to connect with your Twitter account. This is the standard procedure for connecting services with social accounts. It's basically authorizing an app (or *application*) to serve the communication between them.

4. Type in your Twitter username and password and click the Authorize App button shown in Figure 2-8.

By typing in your username and password, you're giving HootSuite permission to connect to your Twitter account.

The page refreshes, and you see your Twitter username and a box to add team members to this account. Don't worry about adding team members now. You can always complete this step later if you want to.

5. Close the box for team members and then repeat these steps for any other social networks.



Figure 2-7



Figure 2-8



When you're adding Facebook, be sure to click the Facebook *Page* icon. You can add your personal account, too, but for this you want to focus on your business accounts. Note, however, that you'll authorize the connection to Facebook by entering your Facebook *personal account e-mail address and Facebook password* because that's how your business Page is connected. When you add your credentials, a dialog box with your Facebook Page(s) opens.

Scheduling posts through HootSuite

One of the great features of HootSuite is that you can create a single message that you can then post to all your accounts, which is a real time saver. When you log in to HootSuite, you see your dashboard, as shown in Figure 2-9. Tabs with the names of your accounts and thumbnail images of your accounts are at the top of the dashboard.

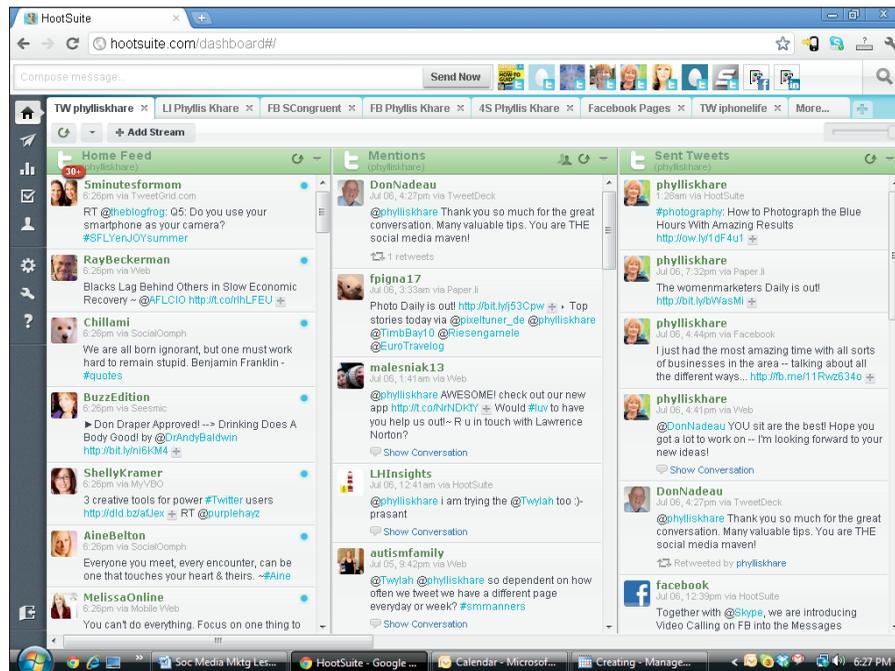


Figure 2-9

You can put aside time during the week or on a Sunday afternoon to schedule important information to post at different times all week. Then sit back and enjoy the real-time conversational quality of the social sites, knowing your marketing messages are all going out on time. There are two ways you can post messages:

- **Post to all accounts at one time.**
- **Schedule messages to be posted.**

Posting to multiple accounts simultaneously

To post to multiple accounts simultaneously via HootSuite, follow these steps:



1. Click the Streams icon.

Now you'll see all of your social accounts on separate tabs at the top of the page, and their thumbnail images to the right of the Compose Message space.



If all your accounts are in your name, you might want to put TW (Twitter) FB (Facebook) LI (LinkedIn) in front of your name so you know which account is which. To do so, click the name on the tab and edit it.

2. Click the Compose Message box and type your message.

Make sure you keep your post, including any links, shorter than the service with the strictest requirements.

Note the options you have here, such as shrinking the URL to make it trackable, attaching a file, scheduling a post, saving as a draft, and a character count. See Figure 2-10.

Type your post here.



Attach a file.

Schedule a message.

The green check mark shows this service is selected.

Watch your character count.

Figure 2-10

It's a best practice to use trackable links. You'll want to know if people are clicking them and view all the related analytics. I discuss this in detail in Lesson 8. If you make it a habit to shorten your links in the HootSuite interface, you can use HootSuite's built-in analytics program.

LINGO

Trackable means that, for the link you've created, you'll be able to see how many times it was clicked, what social platform it was on when it was clicked, if it was shared, and the geolocation where it was clicked.

3. Click the thumbnail pictures of the accounts you want to post this message to.

Services you select are denoted by a green check mark.

4. Click Send Now.

Pretty close to instantly, all your social accounts have the same message posted.

Scheduling a post to go out

When you want to schedule a post to go out, you follow the same procedure you follow to create a post (refer to Steps 1–3 in the preceding section), but before you send it out, you do the following:



1. Click the Schedule Message icon (instead of the Send Now icon).

Clicking the icon opens a calendar box — shown in Figure 2-11 — where you can set the day and time for the message to go out. Notice the optional Schedule in Bulk button that takes you to a power user's section on posting lots of messages. May the force be with you.

Schedule Message

August 2011

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

2011-08-01

3 : 25

AM PM

Email me when message is sent

Schedule in Bulk Done

Figure 2-11

2. Set the day and time you want the message to post and click the Done button.

Make sure you have the social account thumbnail picture selected for the social account where you want it to post.

3. Click the Schedule button.

Now you see it in the Pending Tweets column, shown in Figure 2-12.



Figure 2-12

4. Hover your cursor over the Pending message and click Edit to edit the text and the day and time it's scheduled — or click the X icon to delete the message.

EXTRA INFO

If you want to see Pending Stream posts for all your social accounts, you need to add them as new columns. To add a Pending column to your HootSuite account, just click Add Stream, and select the social account and the type of column (in this case, use the drop-down to select Pending and then click Add Stream). Now you see the Pending Tweets or posts in their own column.

To organize and schedule posts through Publisher, follow these steps:



1. Click the Publisher icon on the left column.

A new interface opens that can be toggled from the List view to a Day, Week, or Month view.

2. Click the Month view in the top right corner.

This is one of the views you can use. After we go through these steps you can try it in the Day and Week view, too. In the Day or Week view you can click on specific times directly.

3. Click any day on the Calendar.

4. Type your post in the posting box, select the time and the thumbnail of the account you want to use, click Done, and then click Schedule.

Now you see your pending post in the Publisher calendar, in any view (Day, Week, or Month).

5. Drag and drop your post anywhere else on the calendar!

Cool, right? Now you can easily view and rearrange all your pending posts!

You can do the drag and drop thing on any view, but if you're moving the post to another month, you'll have to drag it to the bottom to place it on the next month and then advance the calendar view to that month. If you want to move it to another month, it's easier to edit the pending post instead of dragging it around, by double-clicking the post and editing the date.

6. (Optional) Click the message and then click Edit.

You can edit all parts of it, including when it posts.

7. (Optional) Click the message and then click Delete.

You'll need to confirm the delete.

I hope you explore this particular feature of HootSuite. More than likely, you have a group of tweets and Facebook posts that you can schedule in advance, freeing up your time for direct conversations and commenting.

GO ONLINE

I'm a big fan of the free HootSuite for Twitter iPad app; look for it in iTunes. With this app installed on your iPad, it's easy to post to multiple social media accounts. You can also check the analytics of a post, retweet to multiple accounts, save, e-mail, and send to Instapaper — all things social people like me want and need.



Summing Up

There's a saying, "pulling back on the bow," which can translate into "getting your ducks in a row," which really means (I'm a poet and don't know it!), getting clear on who your customers are, where they hang out online, how to meet them there, and how to give them what they want and/or need in exchange for money.

The marketing and management strategies you develop now and going forward will serve you well as you dive into this new, wild and wonderful social media world.

In this lesson you did the following:

- ✓ Delved into creating a great social media marketing mindset that will get you in line with attraction-based marketing principles.
- ✓ Created an editorial and time management calendar that helps you to accomplish all the key tasks necessary to maintain a presence online and attract potential customers.
- ✓ Defined your customer demographic so that you know exactly who your social media marketing campaign targets.
- ✓ Figured out where your customers hang out online so you can be there too, helping to answer questions and give expert advice.
- ✓ Created a basic marketing plan so you can put all these new ideas and social activities into action.
- ✓ Learned how to create a social press release that's short, smart, and geeky — just what you need to attract customers online.
- ✓ Opened a HootSuite account to make the posting process as easy as possible.

Know This Tech Talk

affiliate marketing: Being an outside salesperson by promoting something from another company or website and receiving some sort of commission or percentage in return

attraction-based marketing: Marketing by sharing content freely, developing a strong social authority whereby people seek you out, rather than you pushing your products to them; sometimes called *pull-based marketing*

editorial calendar: Advance planning and organizing of pertinent topics for blog posts and posts on your social media accounts for your business

geolocation: The identification of the real-world geographic location of an Internet-connected computer or mobile device, and it can include country, city, postal/zip code, latitude, longitude, and time zone — in other words, social platforms that use geolocation can tell where you are, based on the phone in your pocket

keyword: Words and phrases that are good descriptors of your business or product; also, terms your customers are using to search for your business products and services online

keyword prominence: Putting main keywords inside the first two paragraphs of your content

keyword proximity: The distance between keywords

push-based marketing: Traditional marketing pushed out to find an audience, as opposed to attracting an audience by word of mouth or social media skills that entice a tech-savvy audience

social press release: An announcement that uses social platforms to inform the world of new products, services, and so on, using blogs to tell your story; shorter, smarter, and geekier than a traditional press release

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