

-SAMPLE EXCERPT ONLY-

# MAXIMIZE YOUR SOCIAL.

A  
ONE-STOP  
GUIDE TO BUILDING A  
**SOCIAL MEDIA  
STRATEGY**  
FOR MARKETING  
AND BUSINESS  
SUCCESS

Neal Schaffer

## PRAISE FOR **MAXIMIZE YOUR SOCIAL**

“Neal Schaffer is one of the few true expert strategists in this vast new social media reality we live in.”

—Pepe Aguilar  
Eight time Grammy winning artist;  
President of Green Dream Social

“Neal Schaffer is one smart cookie. So take a bite out of his new book, *Maximize Your Social*. And while you’re chewing, rework your social media strategy!”

—Brian Carter  
Author of the international best-seller *The Like Economy:  
How Businesses Make Money with Facebook*

“Neal Schaffer understands that social media and marketing were not invented in a vacuum, and that if we bring to our understanding of the communications revolution many of our former skills and ideas about business, we can actually succeed at this new game with a minimum of trauma.”

—Robin Carey  
CEO, Social Media Today

“As a fellow Forbes Influencer, I’ve had the opportunity to watch Neal’s acumen in action. In this new book he brings the social media message to large organizations, and gives today’s busy executives the tools they need to embrace social media. After you read his book, you’ll understand where the ROI is, and how to sell it.”

—Marsha Collier  
Author of the *Ultimate Online Customer Service Guide:  
How to Connect With Your Customer to Sell More*

“Neal is one of the smartest social media marketers on the planet. His ability to combine technical expertise with a holistic approach to social is what really makes him a standout. Every time I get the chance to speak with him I learn something new. Oh, and he’s a hell of a nice guy.”

—Jason Miller  
Sr. Social Media Strategist, Marketo

“Building on his unique background in international business development and marketing, Neal provides a strong strategic perspective combined with a practical step by step approach to social media.”

—Kathy Simmons  
CEO NETSHARE, Inc./Experts Connection

“Neal Schaffer is an outstanding speaker, consultant, and educator in the social media marketing arena. He brings years of practical business experience to a subject that is often misperceived as child’s play. He approaches the topic and use of social media with a creative and solutions-driven approach that cuts through the hype with a focus rarely seen in this space. Neal has taught hundreds of executives at Rutgers

Center for Management Development how to develop strategic and tactical social media marketing initiatives to achieve business challenges. He leverages principles that avoid shiny object syndrome and maintains flexibility in a dynamic space.”

—Peter Methot  
Director of Marketing and Program Development,  
Rutgers Center for Management Development

“Social media is revolutionizing the way brands interact with customers, and practitioners such as Neal Schaffer are at the forefront of communicating what that change means for business—where to get started and how to capitalize on the opportunity. In this book, Schaffer provides no-nonsense advice on determining your social media objectives, developing a strategy, making the most of your content, engaging your customer base and managing the risks. More importantly, he also outlines where to identify the ROI on your social efforts and how to communicate success to the rest of the business. Schaffer writes like he presents—in a practical, anecdote-filled way that is easy to relate to your own experiences. If you want to understand how social is moving from being a pure marketing tool to a medium that can and should be used throughout your entire organization, then read this book.”

—Richard Owen  
CEO, MeetTheBoss TV

“Social media is vexing for a lot of marketers because it is different than traditional and web channels. If you’re looking for a framework for framing how social media should be integrated into overall your marketing strategy, this is the resource you need.”

—Chris Treadaway  
CEO, Polygraph Media

“An indispensable guide for navigating the rapidly changing world of content marketing and social media. By making optimal use of the big four—Facebook, Twitter, LinkedIn, and Google+ —and being prepared for new platforms that may be just around the corner, Neal Schaffer’s insights are invaluable for non-profit organizations.”

—Anthony Flint  
Fellow and Director of Public Affairs, Lincoln Institute of Land Policy

“Neal Schaffer’s new book *Maximize Your Social* is must-read for any business executive or owner to better understand why they need to embrace social media as an integrated part of the company’s marketing mix. Neal’s delivery style is approachable, engaging and most importantly actionable. Neal demonstrates how an effective social media strategy is a must-have for any company to win in today’s marketplace.”

—Glenn Gaudet  
President and Founder, GaggleAMP

“Now that everyone can have a voice, if they choose to, Schaffer explains the ins and outs of social media and the steps to be taken in order to create a social media strategy. This book provides a practical guide on how to leverage your voice to its full advantage. It’s a must for anyone who is responsible for developing a social media plan.”

—**Arnie Kuenn**  
President, Vertical Measures

“If you’re ready to get past the basics, then Neal Schaffer’s *Maximize Your Social Strategy* is everything you’re looking for. Neal is one of the nation’s leading experts and he’s put together a step-by-step guide that shows you how to get past the fundamentals and create a goal-oriented, metrics-based social media program.”

—**Jamie Turner**  
CEO, 60SecondMarketer.com

“Neal is the most connected guy I know. He’s literally friends with everyone I’ve met in the social media marketing world—but not ‘friends’ in a passive sense, like so many of us on social media are. No, Neal is an active friend. He listens, he advises, he coaches, he helps spread the word, he gives feedback. And that’s exactly the kind of guy from whom you want to read a book on social media strategy. Neal doesn’t just know social media strategy—he lives it. So if you want to jump right into what it feels like to have Neal Schaffer as an active friend, then read this book. And when your social media accounts start blowing up as a result of Neal’s advice, go friend him on Facebook and say thanks.”

—**Joshua Parkinson**  
Founder, PostPlanner

“To succeed in today’s world, you must learn to navigate and leverage social media and its enormous potential to bring you closer to your fans and customers. In his latest book, Neal Schaffer will show you how. Whether you’re just getting started in social media or want to take your social media efforts to the next level, *Maximize Your Social* orients you to the new environment and guides you to maximize your social. A must-read for everyone, from the new social media manager to CEOs.”

—**Eric Kim**  
Founder & CEO, Twylah

“Neal Schaffer became an invaluable source of strategic guidance for 1World Online advising on how to extract true value from social media and convert them into tools for our service growth. *Maximize Your Social* will now allow every company to tap into his truly unique expertise in understanding this new business reality of—and how to best leverage—social media.”

—**Alex Fedosseev**  
CEO, 1WorldOnline

“*Maximize Your Social* is a must-read for any business looking to reach out, engage and get measurable results from marketing on social media.”

—**Tammy Kahn Fennell**  
CEO, MarketMeSuite

“We’ve reached a point in the social media revolution in which organizations need to mature beyond an ad hoc approach. In *Maximizing Your Social*, Neal Schaffer has written a welcome and comprehensive strategic approach that includes a drill-down to tactics for the major social media platforms. This is a must-read for entrepreneurs and social media professionals alike.”

—**Ric Dragon**  
Author of *Social Marketology*

“*Maximize Your Social* draws on Neal’s breadth of client experience to give insights into actionable strategy and tactical tips to flourish and avoid social media failure. Having worked with Neal on B2B social media strategy I know this book brings real world insights. Not only into client acquisition and retention through social media, but also into the mechanics and operational challenges you and your organization will face.”

—**Nick Allen**  
Digital Strategist

“Stop waiting for an outside expert to come in with a cookie cutter plan; you know your company and its business objectives best. This book gives you the confidence to understand the landscape of social media marketing and quickly turn your insights into a playbook that you can begin using right away.”

—**Liz Philips**  
Social Media Manager, TaylorMade Golf

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# Introduction

Whenever I present on social media in front of a business audience, I always explain what my professional background was before the advent of Facebook, Twitter, LinkedIn, and other social platforms. You, like the members of my audience, should ask the same of anyone who is trying to offer advice on how your business can use social media. The reason is simple: the professional experience we had before the emergence of social media deeply affects the way we look at how businesses can and should leverage the new opportunities social media provides us. A search engine optimization expert will have a very different perspective than someone who is well versed in public relations. Equally, a “traditional” digital marketer will probably have a completely different perspective than someone with a background in corporate communications.

In the same manner, before we dive into the practical aspects of this book, I want to give you a snapshot of my own professional experience and how it shapes the advice I am about to provide you.

My professional experience has been in business-to-business (B2B, a term I will often refer to throughout this book) sales, business development, and marketing. I should point out that the first 15 years of my career were spent living in Asia and helping foreign businesses launch new sales organizations from scratch and successfully develop new business thereafter. Similar to the way in which learning Mandarin Chinese greatly helped me gain fluency in Japanese, launching a sales operation from



scratch in China for a multibillion-dollar Japanese semiconductor company helped me successfully launch the Western Japan sales office for an American-embedded software company, as well as generate revenues equivalent to more than a quarter of global business from scratch in just two years for a Canadian-embedded software company.

With each business challenge that I accepted, I was representing a company with little or no brand awareness in foreign territory—with the additional challenge that I needed to help market these brands using a foreign language! This experience required me to holistically analyze foreign business environments while working within many areas of the companies and developing practical solutions to help our sales and marketing efforts. There were no role models to mirror, because most foreign companies were not successful at the time, and the ones that were had been built upon historical brand awareness.

In essence, I was creating and implementing a complete corporate strategy for how these companies could launch new business, and I not only was often in charge of the final sales and profit numbers but also had to handle non-sales-related and non-marketing-related issues, such as human resources, customer support, legal, administration, and even information technology (IT).

In addition, I had to be a translator, not only to market products and services from a foreign client in a foreign country, but also to report back to my foreign headquarters regarding what we could do to quickly close current opportunities as well as generate a robust pipeline for the future.

For many businesses, social media is a similarly foreign land. Traditional methods of communication, based on either rigid web copy “script” or language used in advertising that was intended for one-way communication from the brand to the audience, are the reason why some social media crises are born and develop viral legs. Companies with branding guidelines have trouble finding what language they are going to use in the diverse world of social media. How do you create a voice for your company that both aligns with your brand equity and satisfies the requirements of social media users? After all, social media was created for people, not companies, so what should companies talk about in a room full of people?

Of course, social media is not a singular entity: each social media site differs in terms of its history, culture, and functionality. Your average

Facebook user would find it odd if you used a hashtag in your post (although Facebook has recently introduced this functionality), whereas many LinkedIn users would be taken aback if you post updates to your network that are overtly personal. I argue that, just as you would never market a product or service the exact same way to China, Japan, and Korea, you would never speak the same language in the similarly diverse communities of Facebook, Twitter, and LinkedIn.

I don't know if my unique background has provided me with an equally unique insight or not, but I do strongly believe that this experience—in addition to my professional experience in consulting, speaking, training, and coaching companies of all sizes, from start-ups to Fortune 500 companies, on how best to maximize social media—has provided me with enough background to help your company look at social media in a new way. Your company will need as holistic of a social media strategy as I had to create for each unique business environment I encountered in Asia.

A recent industry report that surveyed more than 3,000 marketers indicated that 83 percent of marketers wanted help in creating a social media strategy,<sup>1</sup> and that is the primary focus of the book from which we will begin. However, more than 83 percent of the same marketers also wanted to understand which social tactics were most effective, what are the best ways to engage an audience via social media, and how to measure their return on investment from their social media activities. All of these crucial topics will be covered in this book, which is structured as follows:

- Chapter 1 will get you up to speed on your understanding of recent trends in the business use of social media, regardless of how little or how much experience you have had until now. To get the most out of this book, this will be critical for you to understand.
- Chapters 2 through 5 will then go on to help you create your social media strategy, including helping you determine your social media business objectives as well as assisting you in auditing your current social media efforts.
- Chapters 6 through 11 will provide targeted tactical advice on the major platforms that will appear in most social media strategies: blogging, Facebook, Twitter, LinkedIn, Google+, and the visual social networks of YouTube, Pinterest, and Instagram.

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- Chapters 12 through 17 will then look at the company-wide issues that will undoubtedly arise as you implement your social media strategy. It is here where the question of the return on investment of your social media strategy will be covered in depth.

By following the advice in this book of creating a strategic framework, leveraging the strategic opportunities that each social media channel offers, and implementing a data-driven approach to monitor the success, or failure, of your social media program, your brand or business will also be able to leverage the potential that social media has—and thus truly “maximize your social.”

# Chapter 1 Reality Check

## The Permeating Trends of Social Media and Social Business

Whether you're just getting started with social media, revamping your current efforts through the creation of a social media strategy, or wanting to see what ideas I have to help you propel your social media to a new level, it is important to take a step back and make sure we all equally understand the current trends—and therefore potential scale—that social media holds for all businesses. Just as those who attend my speaking events have varying levels of social media experience, I assume the readers of this book range from beginners to experts. Given that the understanding and experience of using social media for business is different from reader to reader, I like to make sure we all start from the same place when discussing the topic of social media.

I like to discuss three main themes when doing so:

1. Convergence of information and communication
2. Social media's permeation of industry and corporate discipline
3. Big social data and the accessibility of public information

## **CONVERGENCE OF INFORMATION AND COMMUNICATION**

Let's make one thing clear: social media was made for people, not for businesses. Representing a brand, your challenge is to engage with others in a medium that was originally created for people to keep in touch with one another. Fortunately, we have seen a shift in the way that people use social networking sites. Today, more social media users are using the communication tools provided by social media websites to seek out information for their professional and private use.

As someone who remembers life before the Internet, contrasting today with life then provides an interesting picture of this new world that we live in and its potential for businesses. In the past, we all had equal access to a limited amount of information that was spoon-fed to us from a finite number of news sources. Because of this, not only was how we all consumed information limited, but we all shared much commonality in what news we read. The media outlets were able to capitalize on this fact (and still do) by charging a great deal to be able to advertise through these limited outlets, which held huge listening, viewing, and reading audiences captive. In terms of communication with one another way back in the day, we used snail mail or the good old landline telephone.

The digital age, which began with the advent of the Internet and the advance of wireless technologies, allowed both our media consumption as well as our communication to become digital. Channels for both media consumption and communication increased, but the lines between personal communication and media consumption were still separate.

Enter social media. Although most of us joined social networking channels to connect with old classmates (Facebook) or colleagues (LinkedIn), the way we use these same networking sites has been transformed over the past few years. When looking at our News Feed, perhaps we find a link to a Facebook page offering a discount or a news update that interests us. Soon we begin to find—and consume—more information

within social media without even doing searches on Google. For some of us, sites such as Twitter, news sources such as LinkedIn Today, or communities such as LinkedIn Groups become our go-to places to look for the latest information on breaking news or whatever interests us.

One of the first instances where this convergence of information and communication became clear was when a US Airways plane made a successful emergency landing on the Hudson River on January 15, 2009. On that day, “[Twitter] user Janis Krums was aboard a ferry used to rescue stranded passengers, and uploaded the news-breaking photo<sup>1</sup> to TwitPic from his iPhone during the rescue. His caption read ‘There’s a plane in the Hudson. I’m on the ferry going to pick up the people. Crazy.’”<sup>2</sup> This photo announced the news of the crash on Twitter first—10 minutes after takeoff—although the story did not “break” on the *New York Times* site until 16 minutes after the picture was uploaded.<sup>3</sup>

Sites that were meant for social networking have now become the channels where the news breaks. Information and communication are happening simultaneously in social media. This convergence has accelerated to the point where a Skype-like mobile application for private communication popular in Japan called LINE, which has more than 100 million users, recently allowed brands to create accounts and message users<sup>4</sup>; users receive a notification on their smartphones as if it was coming from a friend. Even the Securities and Exchange Commission (SEC) now allows companies to announce key information in compliance with Regulation Fair Disclosure on social media outlets such as Facebook and Twitter.<sup>5</sup>

What does all this mean? I believe that this convergence of information and communication provides all businesses the following three distinct opportunities:

1. **Reach out and engage with customers, prospects, partners, and your network.** Social media provides equal opportunities to engage with current customers in a new and exciting way and to engage and reach out to potential new ones. Although social customer relationship management (CRM) software is still in development, savvy salespeople are already using social media ad hoc to network with and reach out to those who might become future customers. If you consider social media a 24/7 virtual online networking world, you see the opportunities in doing

everything online that you are used to doing for your company offline. Keep in mind that if you are not engaging with your clients in social media, your competitors might already be doing so!

2. **Create opportunity by communicating and sharing information.** If many professionals and consumers are looking for—or finding—information in various social media channels, your company should have a presence there and be providing your company’s content to these interested parties. Obviously, social media is not about self-promotion only, so information that is shared should go beyond just your own company’s blog. There is no *TV Guide* for the Internet (or social media), so you’ll want to share enough relevant content with your particular target demographic that your social media account becomes the channel to which they tune. This means you need to talk about more than just your company, and this may involve curating third-party content as well as crowdsourcing content from your fans.
3. **Manage your reputation and discover new business through monitoring information.** Although it’s obviously a best practice to be listening to all the social media conversations around you as part of your social media strategy, monitoring social media feeds is equally important for big and small companies. Companies that have invested a great deal in their brand equity are sometimes in a defensive mind set when it comes to social media monitoring, working to capture negative tweets and proactively manage them before a social media crisis erupts. On the other hand, businesses also use social media to monitor conversations in hopes of generating new leads or finding new product ideas.

## **SOCIAL MEDIA’S PERMEATION OF INDUSTRY AND CORPORATE DISCIPLINE**

I have worked as a social media consultant, speaker, trainer, and coach for dozens of organizations. These entities range from business-to-consumer companies to those in niche industries that sell to only other businesses. I’ve also worked with nonprofits, educational institutions, and think tanks. The message from this experience is clear: there is no industry that cannot—and should not—maximize the potential that social media offers.

I often challenge attendees of my speaking events to name an industry in which social media has no relevance. Back at a speaking event in 2010, one woman representing a public utility expressed that she couldn't see how on earth her company could be using social media. Interestingly enough, over the past few years many public utilities have embraced social media, some reactively after being hit by a crisis that forced it to become very active in social media to win back the public's trust and repair its damaged reputation.

Another example of social media use in this industry comes from one of my recent consulting clients. This client decided to proactively ramp up its social media presence to build goodwill to help offset any potential social media crisis it might face in the future. This same public utility client also showcases how far social media has come from being a pure marketing tool to being a medium that can and should be used throughout your company. Although the sponsor for my project was in the marketing communications department, I asked that every internal department that had a stake in the company's social media approach be brought to the table for our first meeting, which was an internal hearing on the company's use of social media. Needless to say, the room was filled with representatives from practically every department.

A look at how a platform such as Twitter could be used throughout a company provides an easy-to-understand example of how social media is beginning to permeate departments' use of social media in almost every industry imaginable. Companies usually have members of their public relations, corporate communications, or marketing departments man their Twitter accounts. Over time, companies realize they need to have corporate governance of social media policies (managed by legal departments) as well as the creation and implementation of social media guidelines (managed by human resources). If salespeople want to utilize social media to better engage with their clients, someone from information technology (IT) is called in to decide on the best tools to use, as well as potentially integrate social media functionality into the corporate website. Of course, it will take only one complaint about a product or service to get customer service involved, which may require a dedicated Twitter account for those purposes. Internal hiring managers might also see Twitter emerging as a potential social recruiting platform.

In such a way, social media has evolved from an inside-out promotional medium to an outside-in conversation taking place with the public



where conversations happening throughout social media affect the way that some companies do business. This is how I would best define the evolution from social media to something I would call social business, a buzzword that we often hear in social media circles these days. Your understanding of this evolution will help you create a social media strategy with your entire company in mind, which will be beneficial for your business in the long run.

### **BIG SOCIAL DATA AND THE ACCESSIBILITY OF PUBLIC INFORMATION**

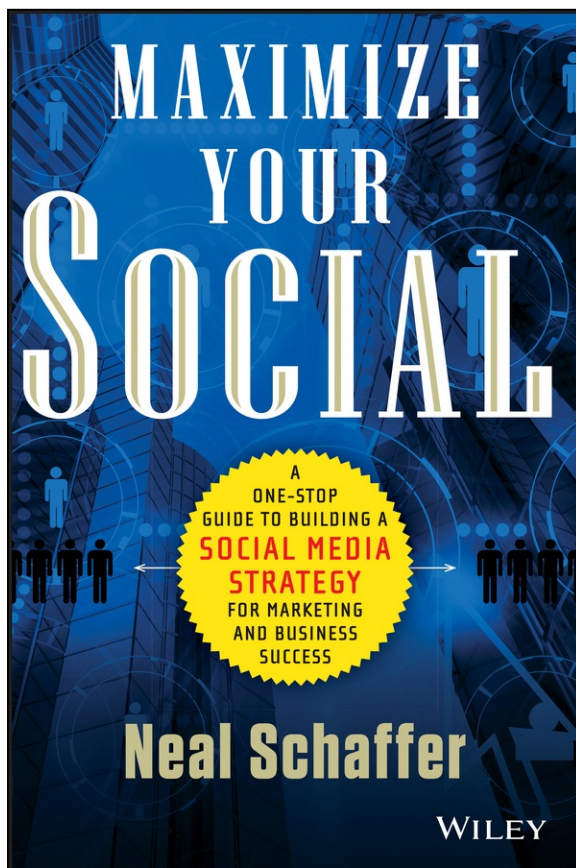
There is a lot of talk in the IT world about big data. A growing amount of this big data comes from the world of social media in the form of uploaded videos, photos, podcasts, blog posts, status updates, discussions, and messages. Although much of big social data is hidden behind privacy settings that limit public access to them, there is a growing amount of data that is publically available for businesses to analyze and learn from. Imagine having the ability to see and evaluate conversations among customers, competitors, and prospects going on around the world and utilizing those data to predict future consumption trends. That world has already begun.

Although many on Facebook or LinkedIn might not make their conversations accessible to the public beyond their own friends or network, a platform such as Twitter is an example of a social network where an overwhelming majority of conversations are available for public consumption. In fact, the US Library of Congress has been archiving our Tweets for some time now. Likewise, although Google+ allows users to share information privately within circles, there are plenty of public conversations on display.

Harnessing all this information is no easy feat, and those who are analyzing it are using listening platforms such as Radian6 or Sysomos to data mine, aggregate, and make sense of it. A friend of mine who is in charge of social media for a beverage company mentioned how the company could analyze public information to look for hints of what new flavors of coffee or tea to develop. The company could also see what topics were being discussed vis-à-vis coffee and tea in regions they already serve and, based on share of voice, determine how well its regional distributors were doing.

Companies have always had the ability to harness the power of their customers' voices to improve their products. Windows 7 is an example of a product that was driven by the error reports and feedback provided by Vista users. Now businesses large and small can actually use a much larger data set to glean insight that can be utilized for new product research, competitive analysis, and even prediction of future needs.

Although the three trends mentioned in this chapter may seem futuristic to your business, your understanding of their potential will greatly help you in both the creation and implementation of your social media strategy. It's now time to start working on how your particular business should be approaching the ever-changing and evolving world of social media.



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