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Is My Organization Ready for Social Media?

8 questions for the social media advocate

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Introduction

There's a great deal of pressure on companies and organizations to get involved in social media. The pressure flows up from the bottom, thanks to a new generation of workers who have grown into their professional life with these tools at hand and, as a result, see social media communities as natural places for outreach and collaboration. From the outside, customers and audiences have become increasingly vocal about the need to "join the conversation."

Indeed, looking at the astronomical growth of social media sites like Facebook and Twitter, you can't help but be tantalized by the potential for getting your message out – whether you sell widgets or you're a membership-based advocacy group dedicated to habitat protection for widgets.

But with reward comes risk – and some poor souls have learned the hard way that social media can be an unforgiving playground. Whether you've got a controversial history of using questionably-sourced palm oil in your chocolate bars or you simply made an error in judgment and gave control of your homepage to the twittering masses, the backlash can be nasty. With the prevalence of the #FAIL hashtag on Twitter on any given day, it's a wonder any organization takes the plunge.

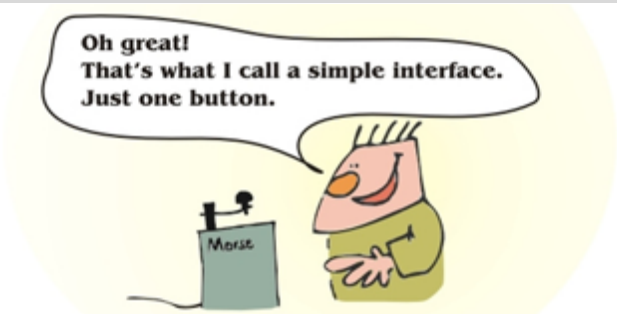
As with any outreach campaign, the degrees of risk and reward vary greatly, depending on a number of factors. Building up false expectations or unwittingly feeding into a customer's sense of frustration are both social media failures, though neither is likely to put you on the front page of mashable.com.

So how do you know when the time is right to dive into social media? At the risk of oversimplifying, it's a lot like knowing when the time is right to launch a public relations campaign in the traditional press, or when to stage an elaborate event for your members. In essence, it's all about strategy and planning.

This paper doesn't purport to be an all-encompassing guide to creating a social media strategy, nor is it intended to be a one-stop shop for all of your business-case building needs. Instead, it's designed to help you get your head around what social media participation means for your organization and to help you decide if you're ready. By answering the questions in the following sections, you should have a good idea of just where you stand.

‘How are we doing with web 1.0?’

I’d like to start this section with a modern day parable related to the question of social media engagement.



There is a small restaurant in the west end of Ottawa, Canada’s capital city. The proprietors of this establishment have done a good job of making the restaurant stand out along one of the drearier stretches of a gentrifying main drag. There’s a contemporary-yet-minimalist sign on the front and the one exposed side wall (facing the parking lot) is dedicated to a massive-yet-tasteful graffiti mural. It is, in every way, an inviting scene.

Walk inside, however, and you’re suddenly faced with ugly formica table tops, stained fabric banquettes and rickety chairs. The carpet is hideously dirty and the various fixtures adorning the ceiling and walls are straight of out the ’80s. You’re inevitably left with the feeling that you’ve somehow been duped. The interior of the restaurant doesn’t match the expectations set by the outside. The customer is disappointed before they’ve even looked at the menu or tasted the food (for the record, it’s actually pretty good).

While many organizations are establishing a presence in social channels, the old dot-com site is still largely seen as the hub of any brand’s online identity. People may find out about your product, service or cause in another channel but, in most cases, there’s some degree of follow-up on the owned online property. Even if a potential customer or member doesn’t take the final step of clicking through to your site, it’s a good bet that the content they’re seeing is drawn from your existing site or from other traditional media.

For most organizations, social media represent the spokes in a hub-and-spoke model. In the long run, being active on Twitter or having a Facebook fan page won’t compensate for having a terrible website. And there’s a real risk of setting expectations about customer interaction and support that you can’t meet. Just like the innovative mural outside the restaurant can’t make up for the nauseating décor inside.

And this problem goes beyond simply having an ugly or unusable website. It’s common for organizations to misunderstand the importance of having a mobile-optimized website (or at least a mobile-friendly version of your site), despite the rapid growth in mobile-browsing of social networks. What’s the point of capturing someone’s attention in a social channel if they can’t ultimately view your site because you insisted on a flash intro sequence or your site simply doesn’t display well on a smart phone?

You will never have more control over any online property than you do over your own dot-com site. Spend the time to get that right before you try to move into social channels.

‘What is our organizational culture?’

Engaging with social media will not change your organizational culture, it will only expose it to anyone who cares to look. This isn’t to say that social technologies can’t be a used as part of a corporate culture shift, should you choose to undertake one, but, here’s a cautionary note: if you give people (be they your customers or your employees) a soap box, they might just decide to use it – possibly to your detriment.

This particular question applies both to internal and external projects. Creating a blog for the CEO isn’t going to make your employees feel engaged and appreciated. These kinds of social media tools can play a valuable role in creating an engaged workforce – check out any of the companies and organizations profiled in Neilsen’s annual review of the best intranets if you’re looking for inspiration – but organizational culture has to support this engagement.

Need to know how such an initiative might work in your organization? Look around at other engagement efforts. Is there a suggestion box in place, be it physical or virtual? Do the bosses reply to feedback and demonstrate how they’re taking suggestions and comments to heart? If not, you may want to ask why before plunging into an online engagement project.

The external issue is a bit more complex. Companies like Dell have been so highly praised for their integration of social media into their customer service system that it was inevitable others would race to Twitter and create [BrandName]Cares accounts. It’s easy to do, too: set up a keyword search for your brand and reach out to people talking about negative experiences. Ta-da! Online outreach and social media customer support in one package. But what’s the next step? Not every concern can be addressed in 140 characters, so where does this virtual customer service rep direct the injured party? Based on anecdotal experience, it’s usually back into the 1-800 phone maze that few companies do well.

If people are complaining about your company on Twitter, they’re already upset. Simply reaching out to them is a hollow gesture that may only serve to frustrate them further if your customer service culture is terrible to begin with. Dell made it work for them. Many, many others have tried but failed to match this model because the internal customer service culture didn’t match the company’s level of engagement online.

It comes down to the fundamental understanding that social media tools are just that: tools. They’re robust tools with potentially game-changing applications, yes, but like any other tool, they have specific functions. If your organization is not prepared to use them effectively, they won’t do the job you hope they will do.

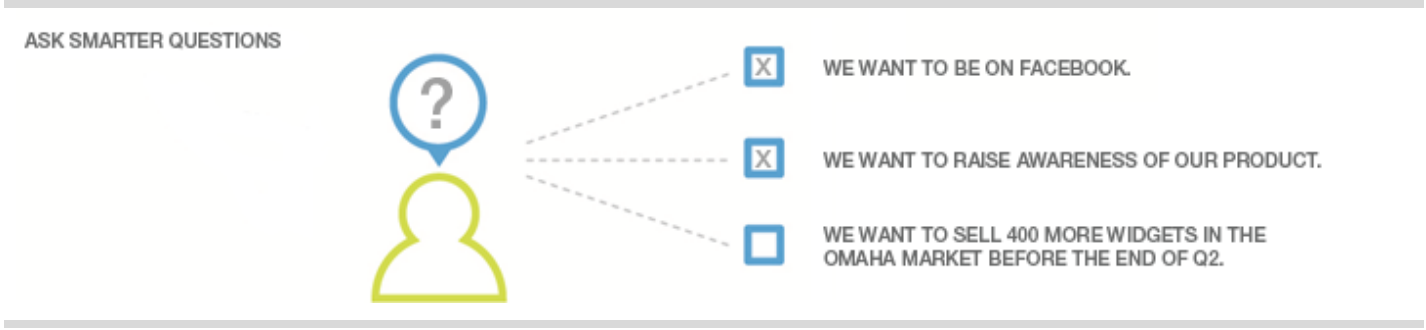
‘What does success look like?’

If your answer to the above question is “being on Facebook,” start over. If your answer is “having 2,000 fans on Facebook,” start over.

Simply being present on a social media site and building up a large fan / follower base isn’t enough – what matters is how you leverage the social capital they represent. For many organizations, one of the most attractive features of social participation is the ease with which people can publicly declare their loyalty or fandom. However, that ease of participation has its drawbacks too – if all people do is click ‘follow,’ how much value does each follower really place on your relationship?

This is especially true given the trend to offer incentives to sign up for a group or follow a twitter feed. If someone is only following you and retweeting your message in the hopes of winning an iPad, how loyal are they?

It comes down to the understanding that social media are tools in much the same way that press releases, media buys or poster campaigns are tools. Success doesn’t come from using the tool; it comes from meeting the objectives you set out. Those objectives should be SMART (specific, measurable, achievable, realistic and time-focused), and they should look a lot like your overall corporate or organizational goals.



Once you settle on a reason for social media participation, test it. If you can still logically ask “why” in response to this statement, it can’t be considered a measurable success:

Can Facebook help you meet that goal? Possibly. But it’s going to require a lot more strategic thought than simply starting a Facebook fan page.

‘Why are we interested in social media?’

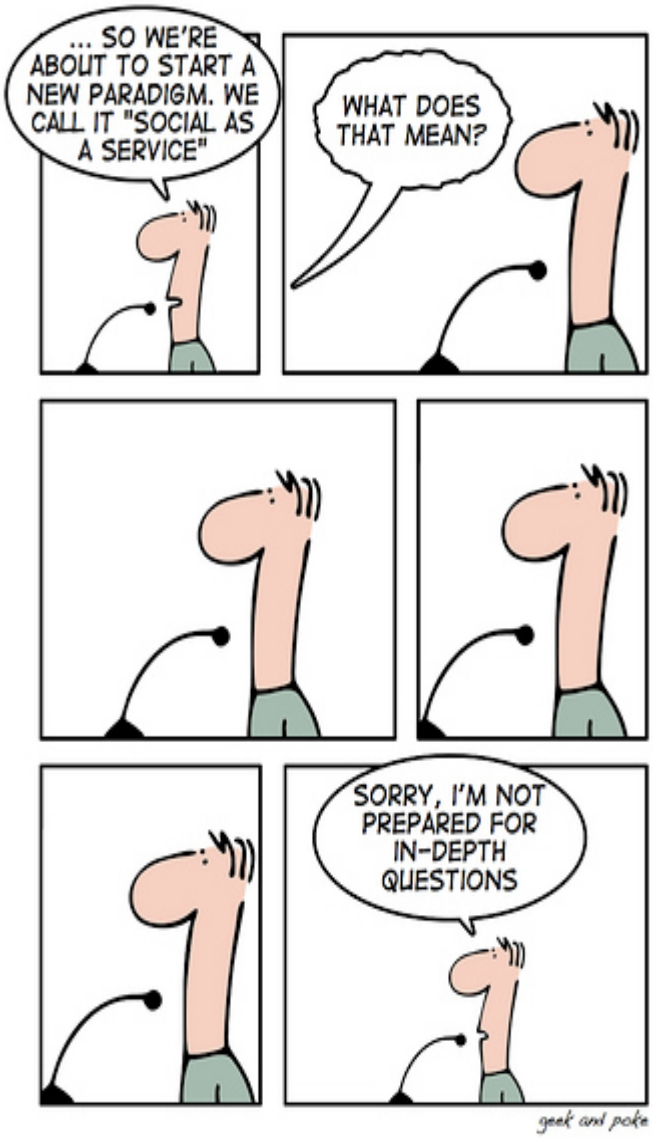
The only thing more futile than ignoring social media because you think it’s all a fad is rushing to embrace social media because everyone else is doing it.

Participation in social media is not an all-or-nothing proposition. Notwithstanding the litany of blog posts and articles about what social media “is,” social media is a plural noun. Social media are a bunch of loosely-related tools, services and channels. There are shared characteristics among these tools and communities, of course, but Twitter is not the same as Facebook any more than a press release is the same as a guest editorial.

As an organization, you’re probably not interested in *all* social media. You might only be interested in giving your customers or members a chance to comment on content that you’ve created. In this case, you might consider enabling comments or a rating system on your website. It may also point to launching a blog or a YouTube channel. Or maybe you’re interested in finding brand advocates to spread your message for you. That points more towards integrating a Facebook login in some way, or starting a Twitter feed.

The point is that interest in social media can’t be the sole reason for using them corporately. Take the time to learn the nuances of various social channels and platforms – preferably starting with a personal account rather than something branded. Lurk for a while before you dive in; figure out how things work. And check out what other companies and organizations are doing in these areas. Not sure where to start? Register a Twitter account and start following a few brands that are doing a good job of outreach, like @CEO_INGDirect, @RichardAtDELL and @HRBlock (Note that these are good examples in April 2010, but it’s impossible to predict what the future holds).

Now revisit the titular question for this section. Your answer is likely to be better informed.



‘What’s our audience doing online?’

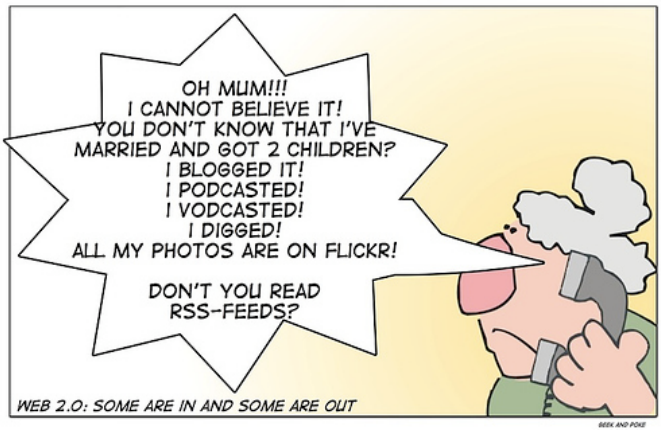
The past few questions have been inward-looking. Now it’s time to start considering the “social” part of social media.

Even the greatest social media campaign in the world – one with all the virtual bells and viral whistles – will be doomed to fail if there’s no audience for it. This is not a new concept. Traditional marketing and outreach campaigns are demographically targeted the same way.

For example, you probably wouldn’t run a television spot for a monster truck rally on the Food Network. On the surface, targeting your social media efforts is pretty similar. User statistics for various social channels are readily available online and most of the bigger players offer self-serve advertising buys, which means you can access their rich targeting information free of charge. Want to know how many 18-25 year old males from Alberta are using Facebook? Start the process of buying an ad; you’ll get the data before you ever have to click “confirm.”

That said, social media targeting is a little more challenging than traditional marketing. It isn’t just about impressions and eyeballs. As cliché as it sounds, it’s about engagement – conversations and interactions. Simply knowing where your audience is isn’t enough, you have to understand the tendencies of the people you want to reach and the nuances of the channels in which you’re running campaigns.

The former is getting easier to do, thanks to the folks at Forrester Research and their consumer profile tool. This handy little application lets you plug in some basic demographic information (the kind that forms the backbone of traditional targeting) and, presto, you can see the tendencies of your target audience. If a large percentage of your target audience falls under the ‘inactive’ category, you probably don’t want to be involved with social media at all. Otherwise, let the nuances of your audience’s online tendencies guide you.

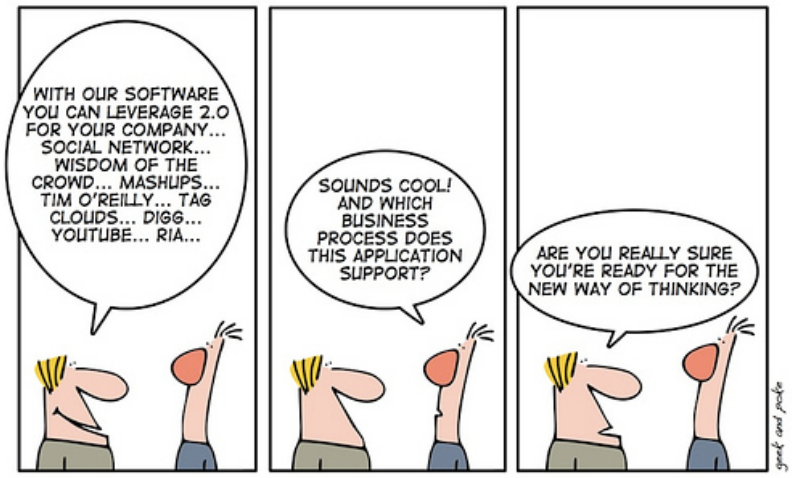


Unfortunately, if you want to get a handle on the nuances of the various social channels, there’s no tool for that. You’re going to have to spend some time on them or find someone who does to advise you. Remember, these are *social* media; if you unwittingly violate some unwritten rule of engagement, you’ll hear about it.

‘How can we build on our existing efforts?’

There is a lot about social media that is revolutionary, but the ways in which you choose to use them shouldn’t be. This relates quite closely to the organizational culture question from earlier. If you want your social media efforts to succeed, they should be a logical extension of what you’re already doing.

Do you have an inbound call centre for customer support? Setting up a virtual customer service operation is a logical extension of that (though, as discussed in the organizational culture section, make sure your offline operations are working effectively first).



On the other hand, maybe you’re not used to direct interaction with irate customers, but you’ve got a CEO or executive director with some incredible insight into your industry or sector. In that case, maybe a blog or podcast is more in your wheelhouse. There is plenty of free software available for such tools, including WordPress or blogger.com for blogs and Garage Band (for Mac) or Audacity (for PC) for recording and editing podcasts – the technology itself need not be a barrier.

Finding the logical social extension of your traditional outreach efforts is important for two reasons:

1. It ensures you’re building on familiar practices. You probably already have support systems in place – they may need some tweaking, but you won’t have to reinvent the wheel. Your call centre can probably be reconfigured to deal with online interaction without too much work. Your verbose but engaging CEO can probably be convinced to write his thoughts down (or at least dictate them to a delegate scribe).

2. It makes it a lot easier for you to get approval from stakeholders. Rather than selling social media as some new and terrifying entity, you’re selling another way of doing what you already do. You can put things in terms a skeptic can understand and, best of all, there’s probably already a business case for the traditional tactics that you can crib from.

‘How much engagement are we ready for?’

The wide array of social media tools available today represents surprisingly different degrees of sociality. While most skeptics point to the well-known, well-publicized cases of social media backlash, these public failures tended to take place in the channels with the highest levels of engagement potential. Not all social media tools have the same level of risk.

Wanting to use social media doesn’t mean you’re suggesting a totally open forum or a Wild West free-for-all. Podcasts, for example, are considered a social media tool based largely on their portability and ability to be shared, but the message in each podcast is tightly controlled and the comment function in iTunes is largely underutilized.

When deciding which social media channels may be right for your organization, be honest with yourself. If your organization is not ready for an open discussion with your members or customers in a public forum, then don’t launch a Facebook page.

In the same vein, be honest with your audiences too. Don’t set false expectations, either explicitly (by asking for feedback or announcing this “new way to communicate with your customers”) or implicitly (simply by being present in a highly social channel).

The good news is that people are surprisingly willing to abide by restrictions or guidelines so long as they’re explained and reasonable. Need a comment moderation policy to protect yourself, either legally or ethically? Fine, just write it as plainly as you can and make sure people who leave comments know about it in advance. You’ll be surprised by how quickly people self-police. Can’t staff a virtual help desk 24/7? Set service standards right from the start and make them public. If someone knows they’re going to have to wait until the next business day for a response or a comment to be approved, they probably won’t bombard your message board or Facebook wall with accusations of censorship.

‘What if everything goes off the rails?’

There seems to be a reluctance in many organizations to even discuss worst-case scenarios, let alone plan for them. This head-in-the-sand approach to planning doesn’t make much sense when planning for traditional outreach or communications campaigns – it certainly won’t fly when it comes to social media participation.

Worst-case scenario planning is actually kind of fun, or at least cathartic. So embrace it. Get the biggest skeptics in a room with you and encourage them to let fly with their nightmare scenarios. Your role in this session isn’t to argue the improbability of the scenarios or to try to soothe their fears – at least not yet. Just let them have their say and thank them for the input, then tackle them one by one by drafting contingency plans, figuring out the shortest possible approval chain for responding to problems and, if necessary and appropriate, coming up with a few pre-approved responses to the most likely scenarios. In the end, these won’t be the only tools you’ll need, but they can at least buy you some time if something does go wrong.

Still not sure where to start? Here’s the thing: Most organizations already have a lot of these processes in place. They may not be written for social channels but odds are that, somewhere in your organization, a team or an individual has already done some thinking about how to handle a crisis. If nobody has, that’s something that needs to be addressed whether or not you’re using social media.

It comes down to being honest with yourself and open with everyone else. As discussed previously, social media won’t change your organizational culture, so don’t pretend you’ll be able to deal with an open forum if your gut reaction is to batten down the hatches in times of trouble. Worst-case scenario planning is only effective if you can actually find a reasonable solution to the problems you identify.

Conclusion

A good portion of this paper has been devoted to discussing the risks and potentially negative outcomes of social media participation. Those sorts of reality checks are important, as the allure of reaching mass audiences on a shoestring budget can be strong – especially for those who believe that social media can play a role in organizational communications and marketing.

The reality is that social media are not magic wands. But when wielded effectively, they can complement other outreach efforts in a variety of ways. The important thing is to be realistic when setting goals and evaluating what your organization can really support. Understand the differences between the various tools and channels – not just differences in who uses them, but differences in how they are used and what that might mean to your organization.

If you’ve concluded that there are good opportunities in social media for your organization, be realistic when you’re seeking buy-in. Don’t promise the moon if you’re proposing tentative first steps. Align your pitch with your organizational objectives and, where possible, explain how social media can be a logical extension of existing practices.

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NLC leads seven Solutions Groups

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Our **Digital Marketing Group** provides services in organic search optimization, pay-per-click search management, email management and social marketing.

Our **Design and Multimedia Group** continues to win awards for their high impact online design projects, which achieve the goal of compelling design without sacrificing functionality and ease of navigation.

Each Solutions Group leverages proven methodologies and extensive technology partnerships to deliver effective, individualized solutions that satisfy customers worldwide.

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