SOCIAL MEDIA AND PUBLIC RELATIONS

EIGHT NEW PRACTICES FOR THE PR PROFESSIONAL

DEIRDRE BREAKENRIDGE

Praise for *Social Media and Public Relations*

"The desire to be strategic about social media and PR is no longer enough—these days you must first master the eight new PR practices laid out by Breakenridge. If you want to sit at the social media strategy table, then read this book. Better yet, make sure you share it!"

—**Charlene Li**, author of *Open Leadership* and *Groundswell*, Founder of Altimeter Group

"Never before has a book explained how PR is evolving like Deirdre Breakenridge's *Social Media and Public Relations: Eight New Practices for the PR Professional*. The industry is in turmoil, as the digital era begins to settle and PR is looking for a home among marketing, content, and social media. Breakenridge breaks down eight areas to focus on for both career and business growth, including research, reputation, collaboration, and most importantly, measurement. It's a must-read for any PR practitioner, no matter level or expertise."

—**Gini Dietrich**, CEO Arment Dietrich, Inc., founder Spin Sucks Pro, author of *Spin Sucks*, and coauthor of *Marketing in the Round*

"I believe that any organization with strong values can succeed in social, and the book *Social Media and Public Relations* explains how in thoughtful (and necessary) detail. Anyone who tells you social is easy has not done their homework, and understanding the wealth of information in this book will keep them from failing the final exam."

—**George Faulkner**, Social Brand Engagement Program, IBM

With love and thanks to Megan, Mark, Mom,
and Dad, and my family—The Zieglers
and The Skrobolas—You're my inspiration!

Social Media and Public Relations

Eight New Practices for the PR Professional

Deirdre K. Breakenridge

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Deirdre K. Breakenridge is Chief Executive Officer of Pure Performance Communications, a strategic communications and technology consulting firm in the New York Metro area. A veteran in PR and marketing, Breakenridge has counseled senior-level executives at Fortune 500 companies.

As a five-time published author and entrepreneur, Breakenridge travels worldwide, speaking to corporations and associations on the changing media landscape and the integration of public relations, marketing, and social media. She is an avid blogger at PR 2.0 Strategies and the cofounder of #PRStudChat, a dynamic Twitter community dedicated to educating PR students, professionals, and professors. Her other books include *Putting the Public Back in Public Relations*; *PR 2.0 New Media, New Tools, New Audiences* and *The New PR Toolkit*.

Foreword

Of all the industries to be affected by the massive changes brought about by social media, Public Relations has been on the front lines since the beginning. The reason is simple: Much of social media is done in public, by the public, and the dynamics that have shaped public relations in the past (media relations, interactions with opinion leaders and influencers, and of course, crisis/reputation management) are not only present in social media, but often accentuated and amplified by it.

Recent history is filled with scores of examples of how "social" has dramatically affected brands and even business functions beyond reputation—from "Dell Hell" to "Motrin Moms" to Kenneth Cole promoting his brand at the expense of those sacrificing during the Arab Spring. Social media has proven to upend not only modern day communications processes, but it also possesses the potential to impact a company's bottom line or, at minimum, its reputation. It may not be social media that broke the initial story of Apple's labor practices, but it is social media that keeps a story relevant and in the "newsfeeds" of our lives—whether it be via Facebook, Twitter, or even niche networks such as Pinterest.

The way we've looked at Public Relations in the past must be re-thought or, at minimum, re-examined. In Edelman's 2012 Trust Barometer study, for example, the stakeholder who enjoyed the most significant gain in perceived trust compared to the previous year was a "regular employee." Compare this to the stakeholder group that ranked last (CEOs), and note that regular employees ranked just below "a person like yourself" but above NGO representatives. The data suggests a trend that indicates institutions and those who represent them remain more challenged when it comes to trust versus individuals. If the Public Relations industry were to find itself heading straight into the eye of the perfect storm of it's time, it might just be now.

Never before have professional communicators been tasked with not only making statements, but also understanding "sentiment" viewed not only through the eyes of traditional media, but also through the eyes of the actual public who is empowered to communicate directly via blog, tweet, post, and so on. In today's communications landscape, the journalist now shares the stage with scrappy niche publishers who can break news without their help. The media industry has had no choice but to adapt to this—and many journalists, such as David Pogue from the *New York Times*, now report and influence opinion showing a mastery of not only traditional media techniques, but also of social media tactics.

All of this spells a singular reality for the modern-day communicator: Adapt or die trying. Being a "PR pro" today means understanding and being effective in community management. Practitioners must understand more than ever how to play well with their counterparts in customer service and advertising (especially digital), and the modern-day communicator must understand business strategy—to not only respond and adapt, but to also help shape favorable outcomes for the individuals, organizations, and public they represent. This must be done with a level of transparency and ethical standards that remain higher than ever as social media has proven to punish those who attempt to manipulate it for personal gain.

Deirdre Breakenridge has put together a comprehensive set of guidelines, resources, opinions, and clear thoughts that are designed for the communicators of today and tomorrow who have no choice but to live and work in a real-time, data-driven world. Her constructs set up a cohesive foundation that professionals both in-house and on the services side will be able to benefit from. Her eight PR practices lay out in detail what needs to be considered when PR meets social so that the right infrastructure can be put in place before it's even needed. Consider these thoughts a blueprint for both communication and engagement in an era of social business.

David Armano
EVP of Global Innovation & Integration for Edelman Digital and
author of the Logic + Emotion blog

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Introduction

When Social Media Meets PR, Communication Unites with Technology

Public relations will continue to transform, and the changes you see are monumental. For better or for worse, a career in PR means handling communications in the public spotlight because of the increasing use of social media. In the wake of democratized content and businesses satisfying the needs of the digitally connected consumer, PR had to evolve with a new approach. This approach required a shift in thinking, from strategy and planning all the way through to implementation and measurement. Professionals must discover new research methods, develop specific policies to guide employee and public participation, experiment with content through a variety of social media channels, and learn to connect and build relationships with stakeholders through new technologies.

Every career requires competencies to succeed. In PR, you rely on core competencies, including the ability to research and plan, apply strategies to business goals and objectives, handle issues and crises communications, uphold professional and ethical behavior, manage organizational resources, and demonstrate excellent communications skills. In an age of new media and public conversations, your requirements expand.

In 2011, a pilot study conducted by Sergei Samoilenko of George Mason University, Deborah Ballard-Reisch of Wichita State University, and Bagila Ahatova of Kazakh University of International Relations and World Languages, focused on how "Modern organizations must depend on a new type of communication specialist to creatively solve problems and adapt to rapid organizational change, a global marketplace, and constantly emerging online communities." The researchers designed a communication competency instrument using a framework developed by Pamela Shockeley-Zalaback (2009). The model consists of four major components: knowledge, sensitivity, skills, and values.

The research project, conducted in Kazakhstan, the ninth-largest country in the world by land area,[1] was distributed to professionals holding upper-management positions in public relations. A multi-method survey probed the respondents' expectations about "crucial communication competencies that university graduates with a degree in public relations should possess in order to be successful in their organizations." Among the many interesting findings from the study included how the surveyed employers "identified competence in using new information technologies, relationship building, self-control, ability to initiate dialogue..." as the most important skills for young professionals. Whether it's young professionals entering the workforce or seasoned practitioners, the competent use of information technologies is a necessary skill, which has become a part of the PR professional's daily practice.[2]

Social media requires you to shift your mindset to unite communications and collaborative technology. When you adopt a new attitude and expand your knowledge and skills, the result leads to successfully incorporating new practices into your daily responsibilities, personally and professionally. Despite the question, "Who owns social media in an organization?," PR and communications professionals are in an excellent position to strategically guide all types of communications for their companies, including social media. It's time to seize the opportunity to learn and embrace communications and technology, from the inside out.

Each new practice introduced in *Social Media and Public Relations* is the result of what happens when social media meets PR and communications unites with technology. Following are the eight new practices vital to your role today.

PR Practice #1: The PR Policymaker

The PR Policymaker is a professional who quickly learns that a crucial part of the communications strategy and planning process includes the development of social media policies, training, and governance. Not only developing social media policies, but also maintaining them falls within this new PR practice.

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1 Kazakhstan, Wikipedia entry, http://en.wikipedia.org/wiki/Kazakhstan, January 2012.

2 Samoilenko, Sergei, Ballard-Reisch, Deborah, and Ahatova, Bagila, "Evaluating Employer Communication Competency Expectations in Kazakhstan," Research Paper, Annual Convention of the National Communication Association, November 2011.

PR Practice #2: The Internal Collaboration Generator

The Internal Collaboration Generator is the communications professional who appreciates how social media collaboration starts on the inside of the organization. Because social media moves across the company, it's imperative you work with specific departments (PR, Advertising, Marketing, HR, IT, Legal, Sales, and so on). You are breaking down the silos to increase sharing, collaboration, and innovation for better internal and external communication.

PR Practice #3: The PR Technology Tester

The PR Technology Tester uses technology strategically for greater peer-to-peer communications. At the start of social media, PR was criticized for not being up to speed on the knowledge and use of social media channels, tools, and technology resources. As a PR Technology Tester, you are not only knowledgeable, but also testing the latest technology for better interactions with the public. The effective use of information technologies is a new core competency.

PR Practice #4: The Communications (COMMS) Organizer

The COMMS Organizer is the PR professional who must educate and redirect an organization to implement a new communications process. No longer can companies solely rely on the push or broadcast method to distribute their messages. Now, it's your responsibility to make sure your company's stakeholders are pulling information from the organization. You create new types of stories by developing, coordinating, and curating content through different channels.

PR Practice #5: The Pre-Crisis Doctor

The Pre-Crisis Doctor is the PR professional who realizes every company today can face a crisis. As a Pre-Crisis Doctor, you proactively build crises prevention plans with comment response charts and helpful tools to identify and illustrate levels of crises escalation through all media, including new media. Your new practice requires you to catch the negative sentiment and ease a potentially explosive situation before it escalates to crises proportions.

PR Practice #6: The Relationship Analyzer

The Relationship Analyzer is the PR professional who turns into the communications sociologist with the help of technology. You must observe and analyze how audiences connect—not only with their favorite brands, but also with their peers in web communities. Your new skills include visualizing and mapping the connections for better strategic engagement and higher-level interactions.

PR Practice #7: The Reputation Task Force Member

The Reputation Task Force Member is the PR professional who practices reputation management on steroids. Because social media can change a company's reputation drastically in a short amount of time, PR professionals must teach about core values and brand voice. They must turn on their tracking/monitoring to high speed to respond with immediacy, constant accuracy, and transparency.

PR Practice #8: The Master of the Metrics

The Master of the Metrics is the PR professional who moves from just accepting metrics (no more Advertising Value Equivalents) to forging ahead with measurable objectives and metrics tied to higher-level organizational goals. In this practice, you learn to differentiate between social media business outcomes versus the outtakes and outputs. Measurement has always been a challenging area, and your level of accountability is even higher with respect to social media communications.

After you read *Social Media and Public Relations: Eight New Practices for the PR Professional,* you can fully understand what happens when social media meets PR. The union of communications and technology offers PR professionals the potential to mold their performance in a more strategic direction. You can also crystallize how PR has expanded and the tremendous opportunity that awaits you. With new social media practices surfacing, your development and application of strategic activities versus many of the tactical functions in the past raises the value of PR—not only in the eyes of organizational executives, but also how it appears in the eyes of the public.

Your eight new practices can become a part of your social media strategy and planning, which includes the research and discovery process, goal and objective setting, budgeting, monitoring/tracking, channel distribution, communications messaging and content optimization, levels of engagement, and benchmark measurements. Figure I.1 shows the Social Media Strategy Wheel. (For more information regarding the Social Media Strategy Wheel, with details about its components, visit the Appendix.)

Figure I.1 The Social Media Strategy Wheel

Applying these eight practices successfully as they apply to your social media strategy and planning within your organization is a chance to claim your seat at the strategy table. And based upon the nature of the new practices, you can connect to the solutions that keep executives up at night. For this reason, you need to be at the strategy table. Of course, before you dive into learning more about the eight new practices, you must realize mastering public relations today does not mean abandoning core PR principles. No matter what new practices you incorporate into your role, and your company's communications programs, you must always rely on your strong sense of ethics, critical thinking, keen negotiating skills, unique ability to liaise and build relationships, passion for information and research, and your love of written and verbal communication. These are the tenets of PR, naturally embedded in what you do, especially when you move forward with a new practice.

To fully apply the eight new practices, you must start with a different frame of reference. Be prepared to move PR out of its silo and to learn how to (1) incorporate new knowledge and skills into your work; (2) expand your knowledge of other marketing and digital practices, as you become a hybrid or integrated new media professional; (3) act as a liaison to create unique bonds between different groups that don't normally work together within the organization, all functioning harmoniously for better internal as well as external communications; and (4) become a PR champion/influencer who educates others and spearhead a change movement.

The new PR mindset takes into consideration how PR extends beyond what you were used to in the traditional realm, what you've started to master in the online PR arena, and what you've dabbled with in social media. The new mindset is what you can look forward to as you see more businesses becoming "socialized" to meet the needs of their customers. Social media is moving across the organization, from marketing and sales to IT and product development. The future of PR and communications is how you adapt and learn the new practices and how you help your peers to adapt. Embracing new knowledge and skills means you're ready to also move forward to shift the mindset of your organization. The PR professional who works to incorporate new practices into the organization must go through several phases of change. The goal is to be a propelling force, leading the charge, and a change agent who makes the new practices systemic in your organization.

The future of PR lies in your hands, in the hands of the PR influencer and change agent. How you embrace a new way to think and apply the necessary knowledge and skills determines the direction of your role in PR. You either become increasingly more important and a valuable asset, or if all remains the same, you unfortunately someday become obsolete. PR has a tremendous opportunity, with an expansion affecting how businesses connect with their constituents for deeper engagement. It's the difference between PR that simply leads to handling and facilitating messages to the type of PR work that results in powerful information exchange and deeper and more meaningful relationships. It begins with you, the communications professional, and your willingness to accept new practices. Social media and public relations together have moved you to a new plateau. Many exciting changes lie ahead. Learn, embrace, practice, and excel.

1

PR Practice #1: The PR Policymaker

Social media has uncovered the need for professionals to be more closely tied to policymaking, but in a capacity that's different from that in the past. Companies realized not only did their customers want to talk about them in their social media communities, but their employees were also talking. As you may have guessed, the conversations weren't always positive. Whether these organizations opened up the social channels willingly for active involvement or mistakenly shut them down to "protect" the brand, stakeholders were going to communicate...a lot! Regardless of an organization's position on social media, employees like customers found ways to share information through new channels. For employees, it was either tied directly to their daily work activities and personal life, or a mixture of both.

In October 2011, 65% of U.S. companies had a social media policy in place, governing the employee use of social networking sites.[1] Suddenly, the role of the professional involved in developing the social media policymaker is front and center. The **PR Policymaker** is the professional who spearheads and guides the social media policy development process. A once less-known and vacant spot needs to be filled quickly. This was a wake-up call to many company executives. In some cases, it was the "Uh oh," moment, and in other cases for the forward thinking, it was the "Ah ha" moment. Public relations professionals were right there, in either case, to lend assistance. For the latter, PR alerted company executives that there had to be some social governance for employee communication in the social landscape, and guidelines were also necessary to teach the public how to participate with the brand on various social properties.

Teaching people how to participate through social channels in not meant to stifle communication. On the contrary, PR professionals know policies are created to guide and protect all parties participating. The

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1 Premo, Karen and Vollmer, Christopher, "Campaigns to Capabilities Social Media & Marketing 2011," Booz & Co., October 2011.

role of the PR Policymaker helps the company, its employees, and the public to join in conversations the right way and to engage with purpose, in a safe environment that's created for learning and sharing. Kodak discusses this approach by stating in its policy "Maintaining a good reputation—yours and Kodak's" and "Protecting your[s], and Kodak's, privacy and resources," referring to everyone who is active on the Kodak social media properties.[2]

The PR Policymaker practice must begin when you first develop your social media plan. Figure 1.1 shows the Social Media Strategy Wheel with the Audit/Discovery/Research portion of the process where policies need to be identified and fleshed out to create an environment that respects and protects all parties involved.

What Are the Responsibilities of the PR Policymaker?

Stepping up to help champion the social media policy development process is a critical role in the organization; one well suited for the PR professional. From past experience, working with different companies and professionals, the PR Policymaker is responsible for four areas that help his team to build and communicate an effective policy, including the following:

- Getting ready for policy development
- Assembling a core social media team to assist in policymaking
- Doing the research and the policy writing process
- Communicating and measuring policy compliance

Getting Ready for Policy Development

When you prepare for the development process, a *social media audit*, or profile review, is the policy starting point. The audit is critical to the success of how you move forward. Although an "audit" typically

[2] Kodak Social Media Tips, "Sharing Lessons Learned to Help Your Business Grow," 2009.

refers to an outside third party who objectively reviews the social media profile information, in many cases you may not have the resources to call in a third party. Therefore, you must research and uncover the weak or potential areas of concern, with respect to communications on your brand's social profiles (Twitter, Facebook, YouTube, LinkedIn, and so on).

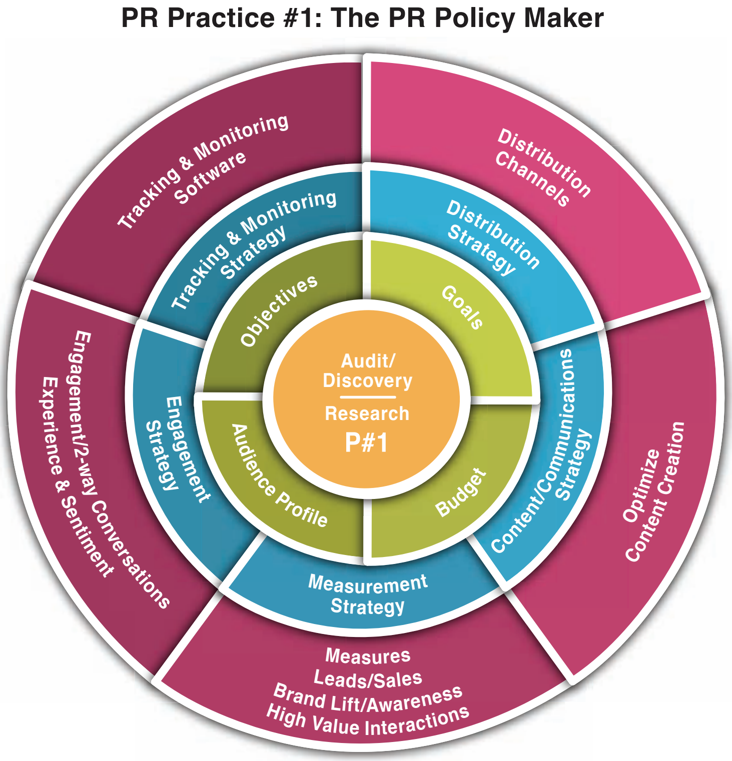

Figure 1.1 Social Media Strategy Wheel: PR Practice #1

The social media audit is usually conducted to identify any challenges or problem areas within a brand's current program, as well as to pinpoint genuine opportunities that have been working with respect to participation and engagement in the social media landscape. Similar to a Strengths, Weaknesses, Opportunities, and Threats (SWOT) exercise, the results enable you to work on your weaknesses and capitalize on your strengths. Then, you can move the best of your program forward, as part of your communications strategy.

During the audit, you identify and evaluate all the existing social media properties for the following:

- Type and size of community, where size may be used as a benchmark for growth over time.
- Brand guideline and usage of proper logo, colors, accepted imagery, and so on for social profiles.
- Engagement with stakeholders, rated on a scale of 1 to 10, with 10 being highly engaged in two-way, meaningful interactions. There is a difference between a brand that informs with news and articles and has a stream of information versus a brand that has discussions and high levels of engagement, answering questions and obtaining feedback about products and services.
- Strategy or purpose of the social profile, whether your social site is used for awareness, customer service, research, and crowdsourcing, and to drive people to the company's website.
- Frequency of the conversations, which can be hourly, daily, weekly, monthly, or the less frequent, sporadic sharing of information.
- Types of content shared, including links to news articles, blog posts, videos, photos, events, widgets, applications, and so on.
- Tracking and measurement used to evaluate the properties, which may include free tools and paid platforms, with charts and graphs for reporting analytics.

By analyzing all the information you retrieve in the audit, you can quickly see clear differences in your properties for brand guidelines, content usage, coordination of content, measurement not tying back to your objectives or goals, and whether your audience interacts with your brand, or each property is just another marketing channel with one way communication (which should not be the purpose of a social media channel). At the same time, you may also discover certain properties are outpacing others based on excellent sharing habits and the ability to offer information that touches on a community's passion or critical issues. All the information in the audit will be the areas you address in your policy—for example, how your employees should use content and what is acceptable use, how to set up a strategic social media channel, proper account management, and following the standard brand guidelines, to name a few.

After you complete your social media audit, you may also want to use this intelligence as an opportunity to compare your findings against those of your competitors. It's important to uncover and capture the same data and information on your direct competition to see their strengths and weaknesses in social media. You would use the identical approach to analyze whether their properties and brand voice are consistent, how frequently they post, and whether they engage on a higher level, more so than your company. You can tell immediately which competitors actually have a strategic approach to social media or if their thinking is tactical, piecemeal, and an unorganized, disjointed effort.

The PR Policymaker also capitalizes on the situation by using all the information from the audit to evaluate and fix what's currently wrong with a social media program. It's also an excellent way to recognize the positive aspects that may already be in place. You must update your social media plan every six months or yearly, and it's vital to conduct your audit at the same time, so you can plan forward. You're probably asking, "How am I supposed to audit 50 different Twitter handles, 30 Facebook pages, and 20 YouTube channels every time we develop a new plan?" For larger brands, it's a cross-section of profiles reviewed by the policymakers, or you can break down the audit exercise and delegate to individuals in specific departments (under your direction). Prior to policy development, you may quickly find that many of these profiles are inactive and have gone "dark," which means they have no activity at all. In the future, if you include a procedure for setting up profiles with a strategic purpose in your policy, it can prevent many of the inactive profiles from surfacing.

Assembling a Social Media Core Team to Assist in Policymaking

PR Policymakers don't wait to be assigned the role. You must take initiative to introduce management formally to the team approach and a process that must be put into place for the organization. You need to work with senior management to determine what social media champions will be a part of the *Social Media Core Team*—a team of dedicated professionals who work together to create vision and strategy, as well as help with policy development. PR cannot build a social media policy in a vacuum.

When you build the Core Team, likely candidates include PR, Marketing, Web, and IT personnel; although there are times when Legal, HR, Sales, and other groups are asked to join the team at the onset. When you assemble your Core Team, you can set up dedicated times to meet and discuss policy development.

One of the first action items for the Core Team is to review the results of the social media profile audit and then to develop questions directly resulting from the audit. Highlighting the right questions can uncover important objectives, goals, liabilities, marketing needs, core areas of focus, and so on. Following are some important questions to ask before you dive into social media policy development:

- What are the objectives of a social media policy, keeping in mind different departments will have different objectives?
- What potential issues, risks, or liabilities did you uncover in your audit, and as a result, what areas need to be addressed in your policy?
- What are the main areas of focus that can help guide your employees and their participation?
- Do employees understand social media, or should there be education included in the policy?
- Who will be responsible to set up social media properties and the management of those brand profiles? Will this be done by department(s) or the central area, and does this information need to be documented in the policy?
- What are the concerns or issues from the various departments that need to be included? That is, is HR concerned about profile account information, or is Legal concerned about privacy issues and intellectual property issues?
- Should the policy include statements on an employee's personal versus professional use of social media?
- What is the best way to share information with employees when you first introduce the policy, as well as when you need to share updates in the future?
- Who will maintain the policy and continually update it moving forward?

These questions and the policies you develop go far beyond the "Rules of Engagement," which are the common ways companies instruct their employees to participate. Many companies devise Rules of Engagement to get their employees communicating via social channels quickly and with good common sense guidance. However, because of numerous employee lawsuits, your policies must go well beyond the fundamentals and be much less ambiguous than earlier policy work. *The New York Times* article in November 2010 documented one of the first legal battles in which an employee posted negatively about a supervisor and then was "unfairly" let go by the company. The National Labor Relations Board claimed that the employee's rights were violated and that the company's Facebook rule was "overly broad" and improperly limited employees' rights to discuss working conditions among themselves. It is cases such as this one that make companies more aware of the importance of a well-written and unambiguous policy to better protect the rights of employees, as well as employers.[3]

Doing the Research and Policy Writing Process

Writing the social media policy for your organization may seem like a daunting task. The number-one question is where do you start? Many companies begin communicating in the social media landscape and then need to step back to build their policies. There are many different approaches, however. The following is an easy way to tackle the development of your social media guidelines:

- Select five or six strong social media policies that have been created by other organizations. Compare different types of policies, but be sure you find policies representative of your industry, nonprofit or government sector. One of the best sources for reviewing policies and social media governance is the website, www.socialmediagovernance.com, with more than 150 policies for review.
- Use the results of your social media profile audit to guide you in the policy writing. All the weaknesses you identified tell you which areas of focus need to be addressed in your policy; that is, branding guidelines, policy set up and account management process, Rules of Engagement, strategic purpose, legal concerns, and so on. These areas can help you develop a matrix approach comparing what you think you need versus what other similar companies develop and include in their policies.
- Create a matrix or Guidelines for Engagement that includes the five or six companies (listed in columns across your matrix) you select, and then list the various sections these organizations use in their social media policies. (Use the last column on the left side of your matrix to list these potential areas.) Select relevant parts from each, especially the guidelines that you feel pertain to activities within your organization, as well as other issues or concerns that look useful. Add

[3] Greenhouse, Steven, "Company Accused of Firing Over Facebook Post," *The New York Times*, November 8, 2010.

this information to the weak areas uncovered in your audit, and list them all on the left side of the matrix.

- Now you can move through the matrix, from column to column (or company to company), marking "Yes" or "No" to determine whether a company has all the areas of focus that you have identified as important. Find similarities between what different organizations, in your industry, use in their guidelines.
- If you find a particular section or guideline is used by at least four of the six companies, that guideline should be highlighted as one that may appear in your policy. These highlighted sections are a "must include" in your policy. Then, you can go back to the other parts that are not highlighted to see which should be included because of their relevance to your organization's social communication.
- From experience in doing this exercise, many of the popular social media policy sections include the following:
  - An introduction to social media and details on the types of social media tools.
  - The social media policy ties to a company's Code of Ethics or Code of Conduct and other company policies.
  - Potential legal concerns for the organization, including:

    Consumer Protection Unfair Trading Regulation

    Advertising Standards Authority

    Intellectual Property (copyright and trademark)

    Disclosure/Confidentiality

    Defamation

    Invasion of Privacy
  - IT issues and mitigating network risks.
  - Statement for employees or members of the organization on their participation (Representation, Responsibility, and Respect).[4]
  - Rules for engagement with explanations—that is, be judicious, be transparent, stick to what you know, and so on.
  - Responsibilities for the account management of social profiles.

[4] Telstra Exchange News, "Telstra Launches Interactive 3Rs Learning Module," December 17, 2009.

– Emerging social media issues, including the following:
  - User-generated content
  - Branding guidelines and standards
  - Personal versus professional use of social media
  - The measurement of social media

Use the matrix comparison to build your own social media policy. This method can provide you with the infrastructure for your guidelines. Ultimately, your social media policy should be included in your overall communications policy for the organization.

Don't wait for a legal issue or a social media crisis to occur before you begin your social media policy development. Get your policy framed out and continue with this same process as you become more involved in social media communications. Now that you've identified specific areas to develop in the social media policy, you can divide the development (writing) process with other members of the team. Remember, as the PR person, you don't want to be writing the IT and social computing policy, or the policy that addresses legal concerns, intellectual property rights, and privacy laws.

As you write your policy, make sure you identify additional company policies that need to be incorporated into the social media policy. In many cases, the organization does not realize there are other company policies that need to be connected to a social media policy. These policies include IT policies for downloaded content and mitigating network risk; HR policies that govern privacy protection; and policies out of the marketing department about brand guidelines. Take a look at your existing organizational policies including your company handbook, and notice they can also help guide your employees with social media communications.

To promote a smooth and efficient writing process, keep the entire team up to date and working toward the goal of a final social media policy. Because you share information on a regular basis, the team should use a collaborative platform to make the process easier and to cut down on email. From Google Docs and Basecamp to sophisticated enterprise platforms such as SharePoint 2010 and IBM's Enterprise 2.0, you learn more about internal collaboration and sharing in Chapter 2, "New Practice #2: The Internal Collaboration Generator."

Communicating and Measuring Policy Compliance

By following the previous steps, you're on your way to having a social media policy for your organization; however, you're only halfway there. The other half of the equation is to think about how you're going to roll out the policy for both the employees and the public, communicate the value, and then measure participation. For instance, Munroe Regional Medical Center in Ocala, Florida, developed an employee policy and a separate public policy instructing the Hospital's constituents in web communities how to interact with them on Facebook and Twitter as well as several of their other social media sites.

According to Mike Robertson, VP of Strategic Planning and Marketing at Munroe Regional Medical Center, getting his Public Information Officer (PIO) to spearhead the process was the most efficient way to develop and introduce the new policy. "In understanding that a patient's information is protected by Federal Law and e-mail addresses / social media engagements are public record under our own Florida Law, I was adamant that we would not participate in social media until we had both crafted a solid social media policy and developed a comprehensive communication and education process for sharing this policy. This responsibility was to fall on the shoulders of my PIO, whose experience in social media (with training from our consultant), public records, and communication made him the most qualified person for the job."

Of course, the other critical part of the social media policy exercise was getting the hospital's associates to read, understand, and then embrace the guidelines that were created. They realized quickly that writing the policy was only step 1. Step 2 included delivering and supporting the policy the right way, and step 3 focused on how to motivate and create action/compliance.

Following are a few ways to introduce and inspire employees to embrace the policies you put in place to guide them:

- Create the longer, more detailed policy, but also develop a two- or three-page summary that is a quick and easy way for them to understand the contents of the longer document.
- Build a presentation template so the policy is in an interactive format rather than a long Word document. For example, it could be a PowerPoint presentation or, better yet, a Flip Book for them to review.
- Design a quiz or quick way to evaluate if employees have read the guidelines and if they understand the contents. This quiz should be taken within a certain period of time so that the policy is read and understood before they engage in social communities (or continue with their previous social networking interactions).

- Create a survey to ask employees about their knowledge of social media (from Facebook and Twitter to Flickr and YouTube). Try to assess the areas of social media in which they may need tutorials and more instruction and training.
- Develop training classes (webinars or in-person training) to get your employees better acquainted with social media and make them feel more comfortable about their participation.
- Create a social newsletter and distribute it internally so all employees know what social outreach programs are currently in place, planned for the future, and also how employees can become more involved in social media.
- Launch an internal social platform that not only promotes your social media participation externally, but also allows employees to test social media, collaborate with peers, meet other members of the company, and allow them to be privy to ideas and innovation that they normally would not access, without an internal social media platform.
- Reward social media participation as a part of employee recognition or a rewards program. Employees will realize social media is accepted by the brand (there's buy-in from leadership) and is a part of the culture of the company.

These are just a few ways you can work with your organization to introduce social media to other employees and have them not only reading the policy, but also wanting to engage and participate in new ways to benefit the company. Remember, writing the policy is only the first part. You need your employee evangelists to be willing participants and to be that unified voice or army of champions who support and add value to the brand's social presence.

The last part of the PR Policymaker process is measuring the behavior and usage of the policy by asking for feedback through employee questionnaires, informal interviews, and polls, and by monitoring and evaluating employee internal participation and collaboration. If you allow your employees to collaborate and innovate internally, it may be through blogs and internal social computing that provide you with feedback. You can "listen" to employee conversations to determine how employees feel about social media, new polices, processes, and ways that they can be involved. Further, they'll let you know their thoughts on the company's efforts to make social media available, and in what ways policy compliance can be improved. Given the right forum, employees will tell you exactly what they want and need, and how they can be better champions to help the company achieve social media goals. Of course, all insightful feedback from employees should be included in updated versions of the policy.

There is no set process or book of rules on how your company develops its policy or who will guide the process. However, it usually takes a PR champion to get the initiative started, one who is a strategic communicator. As a strategic communicator, the practice of the PR Policymaker does not stop with the first round of development. In many organizations, Marketing and PR are responsible for maintaining and updating the policy every six months to a year and then working with different departments on implementation. A good social media policy reflects where and how the organization communicates and the constant social media growth in different communities. As a PR policymaker, you will keep a strategic focus, at all times, to create social guidance that protects and informs employees about their roles and unique participation.

An Interview with a Marketing, Advertising, and New Media Attorney

Kyle-Beth Hilfer (www.kbhilferlaw.com) has more than 20 years' experience as an attorney specializing in advertising, marketing, promotions, intellectual property, and new media law. Ms. Hilfer routinely advises on all aspects of advertising, marketing, and direct mail campaigns. In the social and new media areas, she helps clients leverage social media platforms while protecting their brands and intellectual property. In particular, Ms. Hilfer counsels on such issues as managing employees in social media, running promotions, including sweepstakes, on social media platforms, user-generated content, e-commerce agreements, blogs, affiliate marketing, mobile marketing, testimonials and endorsements in cyberspace, and email marketing.

As an expert on social media law, advertising law, and intellectual property law issues, the media quotes Ms. Hilfer often. She answered a few questions regarding companies and their development of social media policies, offering advice to PR professionals who are involved in the process.

Q: Is there specific legal language that can help protect both employers and employees with respect to their right to free speech via social media?

A: It's difficult to answer this question specifically. However, I can tell you this: Corporate social media policies should emphasize to employees, both orally and in writing, that employees are still free to exercise their Section 7 National Labor Relations Act (NLRA) protected rights. In addition, a well-written policy enunciates its purpose and intent.

Q: Do all companies follow the guidelines of the National Labor Relations Board (NLRB) or are these guidelines only for union employees?

A: It is a misconception the NLRB investigates only companies that work with unionized employees or to employee attempts to unionize. In fact, the NLRB enforces the National Labor Relations Act (NLRA) against a much broader set of unfair labor practices. Section 7 of the NLRA invests employees with the right to engage in concerted activities for the purpose of collective bargaining or other mutual aid or protection. The NLRB has examined many social media cases to evaluate whether employees are acting for their "mutual aid or protection," regardless of a union or lack of union environment. Accordingly, the Board has examined whether 1) employers improperly terminated or disciplined employees because of social media posts that were really a "water cooler" discussion of workplace conditions or 2) employers maintain overbroad policies that unduly restrict its employees' use of social media.

Q: What types of comments on Facebook and Twitter are protected by an employee's First Amendment rights? At what point can an employer reprimand an employee for their comments?

A: The First Amendment obviously protects free speech, but the brands have control over commercial free speech on behalf of the company. If employees are speaking on behalf of a company, they should abide by company standards. The difficult question is when they are speaking on behalf of the company. Certainly, on a brand's social media pages, the employee is functioning as a spokesperson. The inquiry is murkier and requires a fact specific analysis on personal pages.

The competing interest with free speech is employers' right to hire and fire. They also have the right to discipline for activity that violates corporate policies. In deciding whether to reprimand or fire, employers should remember that many of the "social media specialists" have a different generational interpretation of privacy from older employees. Companies need to train their employees about their expectations. At the same time, as case law emerges in this area, we will see if young law clerks have sway over the judges for whom they research and write opinions. As court cases create meaningful precedents, brands should watch for subtle shifts in societal norms to see if they permeate the decisions. As a second issue, employers must consider the PR fallout from firing. Companies must balance their legal rights with the impact of enforcement on their reputations. There are many examples of social media firings that the public has decried openly.

Q: When is the best time for a company to involve a lawyer or legal counsel in social media policy development?

A: Early! Engage specialized legal counsel from the start in developing social media policies and strategies. By specialized, I mean an attorney with depth of experience in social media and advertising law. If a company uses internal general counsel, it may be necessary to retain outside counsel with this expertise.

Legal should sit at the table with the rest of the team: HR, PR, Marketing, and IT. The team should collectively plan a brand's social media policies for its people and its intellectual property. Legal needs to be involved to help ensure these policies afford sufficient protection and are consistent with preexisting guidelines for social interaction, email, confidential information, and intellectual property protection.

In addition, legal counsel will determine if the policies match a brand's corporate culture and help promote any marketing strategies the brand wants to implement. For example, does it want to invite user-generated content onto the social media pages? If so, how will it vet the content before posting? How will it monitor responses to the content? How swiftly should it respond to content or remove it? As a company rolls out into the social media space, it may initiate a prize promotion or a branded loyalty program. Perhaps it will use geo-location technology to enable behavioral marketing. It is imperative that legal be involved early in these discussions to assist in strategy planning with legal paradigms in mind. Counsel should support a company's business goals and help create meaningful programs with minimal legal risk.

Q: What overall advice do you have for PR professionals who are developing social media policies for their organizations?

A: With the advent of social media, PR has become less about speaking on behalf of the company and managing crises and more about influencing what others are saying about the company. As such, PR professionals not only have to identify who speaks on behalf of the company, but also devise goals for the spokesperson's speech. Remember that PR professionals are no longer talking just to the media, although this remains a crucial part of their job. They are also speaking to consumers and customers. Different social media platforms may require different kind of content to influence the social conversation. Unique situations may arise that require special handling. PR professionals always need to be clear about their organization's marketing strategies, legal positions, and brand image. In short, working in social media requires PR professionals to be informed on all fronts and be willing to function as team players in presenting their organizations to the public and responding to public comments. PR managers should have close relationships with the legal team so crises are handled not only from a reputation perspective, but also keeping in mind legal positions and strategies. Effective PR in the age of social media requires a multidisciplinary approach, accompanied by consistent training of and communication with all members of the team.

Social Media Policy Checklist

Before you dive in to write your organization's social media policy, make sure you do the following:

- ✓ Get buy-in from your executives.
- ✓ Assemble your Core Team for policy development and social media strategy.
- ✓ Audit your social media properties to identify strengths and weaknesses.
- ✓ Ask the right questions prior to writing the policy.
- ✓ Address what objectives need to be set in place for different departments in the organization. (Social media doesn't work in a vacuum.)
- ✓ Be prepared to divide the writing responsibilities—don't try to do it all alone.
- ✓ Set up an internal sharing system to collaborate with your Social Media Core Team.
- ✓ Set concrete deadlines for your policy so that the process doesn't take years to complete.
- ✓ Be prepared to communicate the policy and support it moving forward.
- ✓ Inform the team that there will be future planning sessions moving forward to re-evaluate your policy, as social media changes over time.

2

New Practice #2: The Internal Collaboration Generator

By nature, PR professionals pride themselves on better communication. You want your programs to be more effective, which means efficiencies in strategic planning, daily PR activities, and overall communications with stakeholders. However, what's applied for external communications is not always the case inside of your own four walls. With technology at your fingertips, you shouldn't wait to be tasked with the role to find better ways to communicate with your team. Being in public relations means you're always looking for enhanced ways to connect for your clients or externally for your own brands—it's in your DNA. Now it's time to bring the same approach to the inside of the organization.

Suddenly another new practice is born. PR Practice #2, **The Internal Collaboration Generator**, is the PR person who works strategically to evaluate how social collaboration can start internally, beginning with team or department sharing and innovation. On your Social Media Strategy Wheel, auditing your own resources, for better communications, occurs during your discovery process, at the center of the diagram (see Figure 2.1). Better communication on the inside results in far better communications on the outside. Having a good process in place that facilitates increased learning and the sharing of information leads to more productivity and communications impact. However, because technology is far more advanced than years past, it's time for you to think about updating how you collaborate with your peers to reach maximum efficiencies for your company. Turning to technology and the use of a collaborative platform can get a job done more quickly and efficiently, especially when working jointly with other members of the company.

Whether your team is in the same office, in the next state, or across the country, the Internal Collaboration Generator knows how to maximize everyone's time, boost productivity, and cut down on the email that clogs your email inbox. From past experience in coordinating internal employee programs, events, conferences, and other types of PR initiatives, this professional takes the lead to change a painful process into a pleasant experience for all parties involved. However, you may run up against a counter argument from naysayers about technology and productivity. In 2003, a study conducted by Professor Erik Brynjolfsson at MIT showed little positive growth for the use of technology and increased productivity.[1] However, you can make an argument that in 2003, collaborative technology was not as advanced as it is today. Despite conflicting arguments, numerous tools and platforms are available that take knowledge, sharing, and employee collaboration to a new level.

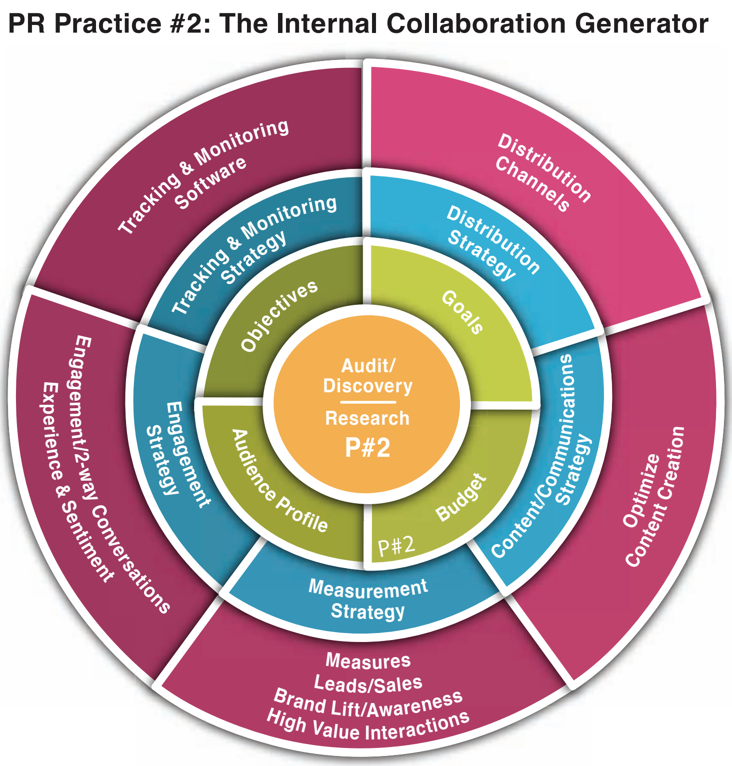

Figure 2.1 The Social Media Strategy Wheel: PR Practice #2

[1] Brynjolfsson, Erik, *Information Technology and Productivity: A Review of the Literature*, MIT Center for Coordination Science, 2003.

Of course, doing research on the best ways to communicate internally requires some homework on how the members of your group or department want to connect and share information. You know that varying levels of social media adoption exist for the people who make up a company. Not everyone is an early adopter. So, as much as you want to feed the needs of the socially skilled, you still must address and educate those who may be your late adopters. The best way to find out is to observe their behavior, discuss their challenges, and ask how they want their communication to be improved. Depending on the size of your company and organizational structure, this can determine how you move forward with your research. It's always best to start with a core group of individuals who you can poll, survey, and even conduct informal, one-on-one interviews to gauge their thoughts about internal collaboration and ways they would want to increase sharing and collaboration with their teammates. Some of your initial research may lead to good insight on what type of sharing is necessary, as well as the required functions in the platform that you choose.

But, be prepared...introducing new ways to communicate within the organization is a cultural challenge. Moving from a traditional communications infrastructure to an internal collaborative platform is a tremendous shift, so you want to ease into the change with a platform that's hands on and fairly easy to use. There are three critical factors when introducing new technology or communication into the organization. A Vovici Webinar discussed how companies should ask their customers if interactions are useful, easy, and enjoyable. What works externally with customers is often overlooked with a company's own employees. It takes the same three areas of focus to create an environment in which the communication process fosters greater interaction and learning through its daily use.[2]

What Are the Responsibilities of the Internal Collaboration Generator?

As an Internal Collaboration Generator, the first part of your practice may be handling concerns or resistance. When moving from an old process to the new, requiring a change or shift in culture, be prepared to transition over time and with perseverance. For as long at it takes to build

[2] Vovici Webinar, "What It Means to be Customer Centric," October 13, 2011.

a solid culture, it takes that long to root a new mindset into an organization's thinking. However, moving through the steps of change management can help the process assimilate into your organization. If you are the Internal Collaboration Generator, you may also be responsible for the plan of action that moves your organization toward a newer, more updated internal communications model.[3]

Change management always starts with a sense of urgency. First and foremost, you may need to convince your senior management that a real sense of urgency exists to create a more efficient means to communicate. Finding research or concrete examples of how direct competitors and companies in similar industries use better platforms to innovate internally is a good way to get the buy-in that you need. Of course, if you want serious consideration, you must put together a formal proposal. Loosely discussing and then asking for new communications technology (unless it's free) does not get you far.

After you receive the buy-in from your executives, it's time to put together your small team of champions, a Coalition, who can help you to research and find out how your peers feel about new technology and the way they are currently communicating. In some cases, this is the same coalition of champions you used in your policymaking efforts. Your coalition should be individuals who are highly respected by their peers and who can point out some of the obstacles you will encounter, based on their close relationships with the folks who will use the technology the most. A coalition doesn't necessarily mean a group of upper management. It's always people who are highly regarded and can change perceptions to create action in your organization.

The third step toward your cultural shift is to have a solid plan in place about the vision and goals of a new communications platform. It's one thing to use Google docs for sharing, but it's completely different to have an enterprise type of system, which is far more complex. When you uncover higher-level sharing needs, a plan keeps everyone focused, and employees quickly understand the objectives and value to bring new communications methods into the company. Every communication initiative must be strategic and requires a plan so that the expectations are realistic, and you can benchmark your progress and goals along the way.

Constant communication is step number four and a critical initiative that requires ongoing messages and updates for employees to embrace the

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[3] Kotter, John, *Leading Change*, Harvard Business Review Press; 1st edition, January 15, 1996.

change. You may think signage in the restrooms or common lunch areas might be a bit overboard, but it's important to reach employees wherever they hang out. You must communicate the program's value and goals more than just once; you can never overcommunicate. Years ago, the CEO of JVC Professional Broadcast Division learned a valuable lesson from his management team. If you don't state your message and goals at least six or seven times (although it sounds repetitive), it just doesn't sink in, and people don't retain the message or intended meaning. He's done this with his executive, management, and sales teams and has seen how frequent and even repetitive communication leads to greater success.[4]

Cementing some benchmark wins is the fifth step and also crucial to prove to upper management and C-Level executives that the communications change management program is well on its way. They want to see that you're creating better collaboration among groups of employees. When you can benchmark a win or series of wins (usually by showing increased usage and projects are on time and under budget), this often puts the naysayers at ease and may even get them more focused on being a part of the team. At this point, you minimize any negativity toward the new communication method and creating more positive energy around social collaboration in the company.

Don't forget to empower your peers along the way, which is step number six. Making your fellow employees feel like they are recognized for moving forward with a new communications process creates energy and momentum. Acknowledgment can be in the form of a public thank-you from a supervisor to gift certificates at favorite restaurants. It's the employees who become the champions in this effort. Many will watch and learn from the coalition that's set in place and then help to further direct the effort, feeling more involved in its success.

The last step, which you see over time, is the change rooted in the culture. When change is rooted, years later, post any core team or coalition, the process becomes a natural part of the organization. New hires coming into the firm will be introduced to internal collaboration as a part of their on-boarding process, beginning with the first human resources packet they receive with information about internal employee collaboration. New hires can quickly realize their organization believes in the power of social media communications and innovation on the inside of the company.

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[4] Interview with Mike Yosheida, CEO, JVC Professional Broadcast Division, National Association of Broadcasters Convention, April 2002.

Remember, when it comes to internal sharing, in some cases, you may already have tools or platforms in place. Then, it's simply a matter to determine what would make employees feel more comfortable about using those tools and what additional education is necessary. Whether it's a simple document-sharing tool, virtual team meetings, project management platforms, or an enterprise platform with full internal social computing capabilities, many underutilize the functions available due to lack of knowledge or inadequate education and training. However, if you start from scratch, it's up to the Internal Collaboration Generator to take the pulse of those who participate on the new platform and to make sure you put a solution in place to satisfy their communication needs.

It wasn't so long ago when you simply relied on an email response or a phone call to find out answers from colleagues about a project or a task at hand. Working together on a plan or project meant hours or days could go by before you received what you needed from each member of your team. What you can do today with a large group collaboratively or a team of a few, and even cross functionally between departments, is far superior to how you shared information in the days pre-2.0 collaboration. Internal sharing has always existed in different formats, but it's never been as productive, efficient, or innovative as it is today.

Determine Your Level of Sharing

For efficient PR planning and better project management, you may find yourself in this newly assigned role. Today, it's a priority to find the best way your communications department or any department can use technology to share information and collaborate with other teams across the company. Of course, so many options are available for selecting the right technology or platform to share internally with your team. The goal is to make the strategic planning process or your project more productive and to make technology work for you. First, you must identify why you need certain functions and what you want to achieve by using collaborative technology.

Following are several questions to ask when you need to determine what level of sharing is necessary:

- What kind of internal communications tools are required? Should they include messaging, discussion forums, wikis, blogs, and chat functions?
- Do you want your platform to have RSS feeds?

- What are the sharing capabilities? Will they include links, file attachments, and documents editing?
- Do you need a platform that has project management capabilities with alerts, team updates, and the ability to post comments and to assign due dates?
- What about group setup? Are there subgroups and discussion forums to collaborate and innovate?
- Do you have the ability to hold meetings and to give a virtual group presentation?
- What is the ease of setup and use, including the managing and uploading of content?
- What kind of technical support is necessary for your team?
- Are there social computing capabilities, such as setting up team member profiles?
- Is customization available? Does the platform enable employees to add designs and photos and maintain the brand's identity?
- Is there email integration or Instant Messaging (IM)?
- What about microblogging capabilities; will this be an easier way to communicate for your team?
- What type of training is available through the platform provider?
- What is your budget, and what is the pricing structure of the platform?

After you answer the questions to clearly identify your communications needs, the next step is to determine what type of platform is the best solution. Before you begin reviewing different platforms, the Internal Collaboration Generator must understand the various levels of collaboration. The ability to share can be divided into different phases:

- **Sharing Phase I:** Simple Document Sharing and Project Management
- **Sharing Phase II:** Collaboration and Web Presentations
- **Sharing Phase III:** Enterprise 2.0 Collaboration and Innovation

For the Sharing Phase III (the most advanced phase), if you're a part of a large organization, check to see if you already have a collaborative enterprise platform in place. There may be many capabilities available to you and your team through an existing platform. In this case, rolling up your sleeves to get more training is required. It's often a lack of understanding and training that prevents communications professionals from using these resources to their fullest capacity.

Following are the three levels of sharing accompanied by a few examples of collaborative tools and platforms.

Sharing Phase I: Simple Document Sharing and Project Management

Many communications professionals are already familiar with the simple sharing tools and know that they can share spreadsheets and documents, all edited in real time. Some of the tools are browser-based applications with minimal requirements to start the sharing process. Team members can share and store their work online wherever an Internet connection is available. The simple sharing platforms also provide free, web-based meeting playgrounds. Several of these tools offer no-hassle whiteboard solutions for collaborating online. In some cases, you can browse websites and even draw on them, which help when evaluating competitors during your planning phases. You can share files and graphics, review and mark them up, and chat with your team.

Other great features in Sharing Phase I include audio options, if you want to communicate verbally with team members who don't necessarily want to draw on the online whiteboard.

Sharing is made easy when a platform enables you to start with a blank slate and to draw lines, shapes, text boxes, and even upload various kinds of media to gather feedback from your teammates and other meeting participants. If you're looking for project management, Sharing Phase I also enables the sharing of files, posting comments, and assigning due dates. If your organization is mobile-based, you can also find project management platforms that can be accessed through mobile devices such as the iPad. A few of the Phase I sharing platforms include Google Docs, Basecamp, Twiddla, Zoho Projects, and One Hub.

In addition, specialized platforms are available for PR and marketing agencies that enable you to work on specific campaigns and to manage the campaign in a private and secure environment. This type of solution is slightly more advanced with the ability to invite outside influencers into the platform, for example, to share your client's virtual media kits, to book interviews for executives with the media, and to download media kit materials, in addition to coordinating and managing the campaign with your teammates.

You learn more about specialized campaign management software in the interview with Ariel Hyatt, founder of Cyber PR, later in the chapter.

Sharing Phase II: Collaboration and Web Presentations

In addition to reviewing and annotating documents and making content available over time for your team, you can consider Sharing Phase II as your always-available real-time meeting room. This type of platform is great when you're on deadline and your colleagues are situated in different areas of the country or even around the world. It enables you to review and annotate documents with your team, cutting down on the large amounts of email that accumulate during your program's strategy and planning process. Phase II sharing includes uploading images, files, documents, and videos into your meeting room for discussion and review. Presentation functionality enables you to review your plans and even share your desktop with a larger group of colleagues online. Most of the platforms in Phase II have teleconferencing and Voice over IP (VoIP) features. You can also invite additional participants including customers, partners, consultants, and other collaborators outside your organization, who can easily access the workspace with no software to install on their end. A few of the Phase II sharing platforms include Vyew, WebEx, GoToMeeting, and Skype.

Sharing Phase III: Enterprise 2.0 Collaboration and Innovation

The final phase of sharing is the most sophisticated. Sharing Phase III is most widely considered as enterprise software solutions for internal collaboration, file sharing, and document management. These platforms are used across geographies and for cross-functional team collaboration. Phase III is excellent for sharing marketing plans, organizational charts, editorial calendars, and project plans. You can customize and brand your pages and profiles and set access and permission levels for any content that needs to be shared by your department and with other groups in the company. Other great functionality includes team collaboration and brainstorming in forums, wikis, and blogs. Phase III can include an entire library of documents as well as a social computing network, which is set up internally for your organization. Phase III sharing platforms include Microsoft SharePoint 2010, IBM Enterprise 2.0, Socialcast, and Socialtext.

Selecting Your Level of Sharing

For all the levels of sharing, it's critical for your team to review, experiment, and then put a suitable collaboration platform to good use. Your understanding and ability to use the technology internally can also help educate other team members about the value and productivity it brings to the organization. Using collaborative technology doesn't mean you can't pick up the phone or send that email, when necessary. There will be times when you decide that walking down the hall to visit with a colleague face-to-face is the best approach. Remember, the technology facilitates great sharing, but it's always the people that make the sharing and innovation a successful part of a company's communications process.

Michael Brito, author of *Smart Business, Social Business* and VP at Edelman Digital, has worked with teams internally to improve employee collaboration. Michael shared his thoughts about PR professionals and their use of new technologies inside the organization.

Q: Do you think that PR agencies in general have been quick or slow to adopt new technologies to collaborate internally?

A: For the most part, I would say that many agencies are definitely slow to adopt new technologies that support collaboration. Of course, that certainly doesn't mean they don't collaborate; it's just usually through the traditional forms of communication like email. On the digital team at Edelman, we do use collaboration and project management tools like Basecamp to communicate with developers and project managers.

Q: How important are internal collaboration, idea sharing, and innovation?

A: Collaboration and idea sharing is fundamental for innovation. And from a communications perspective, it's imperative to find new ways to communicate with stakeholders, whether internal or external. Often times, we get into this habitual way of thinking whereby we do things the same way day in and day out because "that's the way it's always been done." This way of thinking is cancerous to growth and gives birth to organizational silos that plague many companies today.

Q: Does better communication on the inside of the organization lead to better external communications with the public?

A: Yes, I firmly believe that for organizations to have effective, meaningful conversations with its constituents externally, they must have effective, meaningful conversations internally first. This is much more than weekly/monthly conference calls. It requires a fundamental change in behavior from the senior leadership down to individual stakeholders. Otherwise, there will be a continuous disconnect with external customers.

Q: What are some of the better internal collaborative platforms you've used or your teams have used?

A: One platform that I currently use is Yammer. It's cost-effective and provides real-time opportunities to share with the teams within different job functions as well as globally. What I find useful in Yammer is that it allows me to create groups based on topics, so I can look for/share/distribute content based on the subject matter.

Q: When evaluating a platform, what are the most useful functions to help your teamwork more creatively and efficiently on a program?

A: For me, there are a few levels of functionality that are important. As a global firm, we have team members in other countries that we need to collaborate with. So, scale is hugely important for me. Then comes the translation of either content and conversations or general marketing assets. In addition, a content library is essential in order to scale external marketing programs, which is essential to ensure consistency of communications across regions.

An easy approach to selecting the right platform is to compare what technology you need versus the platforms that are available, and which align with your budget. You can set up a matrix that allows you to evaluate your specific objectives for collaboration (listed in the far-left column) and then compare the functionality to a few platform choices (listed across the top row) you believe might be the best solution. For example, if you are looking for more sophisticated collaboration with the ability to set up an internal social computing network, with sharing and collaboration tools, and have a small- to medium-sized budget, you would compare such as Grou.ps, Ning, and Socialtext.

The Internal Collaboration Generator works through the matrix process to find the best solution to facilitate better communication. Of course, for free tools, several resources enable you to take advantage of better sharing capabilities. Some platforms have a "freemium" version, and you can upgrade to a paid subscription over time. If you determine that your best solution requires a budget, you need to create a cost benefit analysis on the platform(s) of choice to present to your executives.

The analysis must include the cost of each platform and why the benefits may outweigh that cost. You also want to note the pros and cons of each platform. The goal is to find the platform that has the most benefits and is reasonably priced; one that can increase in productivity and ultimately save your organization marketing dollars. Preparing this analysis is a "formal" task. Just like anything in social media, the more research, information, and case study examples you can show to illustrate how collaborative technology can benefit your department, or even cross functionally, your executives will take notice.

What Are the Best Practices of the Internal Collaboration Generator?

Ariel Hyatt is a thought leader in the digital PR world: the founder of a successful PR firm, international speaker and educator, and the author of two books on social media and marketing for artists. Ariel's Cyber PR® process marks the intersection of social media with engaged behavior, PR, and online marketing. Ariel foresaw the impact of the Internet and social media and shares her thoughts on PR and technology.

Q: Why is it important for PR people to use collaborative technology and what are the benefits?

A: I am always amazed when PR professionals tell me about the frustration they are feeling in their firms and with their colleagues because all of them are not on the same page, and then their campaigns begin to feel disjointed. When a PR effort lacks consistency, it will also lack results. This is where collaborative technology comes in to save the day. Collaborative technology saves an incredible amount of time and energy. The main benefit is that the entire team from the lead publicist to the interns get to know exactly who has pitched which outlets and what the results are in real time. Other benefits are the agency owner/account executive actually tracks not only the results and outcome but also the effort and actions put in by her team. With collaborative technology, you will never again wonder what your staff has done or what tasks are completed internally. Another massive benefit is on the client side. Clients can track exactly what their PR teams are doing, and the question "What is my PR firm doing for me?" disappears. A

PR firm that can run campaigns when its clients feel at ease because they can see the efforts will run more smoothly and effectively.

Q: How does the project management platform lead to better campaign results?

A: It is no secret that what you measure and monitor will produce better results. A project management platform helps you to measure consistently throughout the entire campaign, which leads to keeping your eye on the proverbial prize. Project management also allows everyone on the team to understand all the efforts being made. It is incredible how much time can go into a campaign and the efforts never get tracked. With a project management platform, they do and will.

Q: In the past, has there been slow integration of technology platforms for campaigns into the PR agency or the marketing communications firm?

A: I believe that there has. Their cost, the learning curve, and the fact that they just take time to implement are hindrances on a busy agency.

The problem of being a PR team is you are consistently living in a world of overwhelm. You need to satisfy demanding clients who consistently check in, and you must constantly manage their expectations. Plus, you must always be on the hunt to generate new business to keep your firm alive. This leaves little room to adapt a whole new platform, train your staff on how to use it, and integrate it into your already wildly busy (and probably quite functional, thank you very much) day-to-day agency.

Internal Collaboration Generator Checklist

- ✓ Check to see what platforms, tools, and resources are currently available in your organization.
- ✓ Research the pros and cons of current sharing practices, and ask peers how they would like to share, collaborate, and innovate together.
- ✓ Answer the Sharing Questions to determine which collaborative platform is best for your current situation and one that reflects future growth.
- ✓ Select a level of sharing, whether it's Phase I, Phase II, or Phase III.
- ✓ Roll up your sleeves and demo/test different platforms for ease of use and functionality.

- ✓ Set up your matrix comparison of your team/department needs versus the capabilities of the platform.
- ✓ Decide if you need to implement a change management program to help peers to move from old communication to new ways of sharing in the organization.
- ✓ Determine your budget, which may require a formal presentation with a cost benefit analysis of various platforms.
- ✓ Communicate and train employees about the value of collaborative technology.

3

New Practice #3: The PR Technology Tester

Communications and technology go together. But, this hasn't always been the case for PR professionals integrating technology into their daily roles. Years ago, when social media surfaced, PR was criticized for not being more in tune and hands on with collaborative networks. The disapproval continued with performance that showed a lack of understanding of how Web 2.0 and democratized content changed the PR approach to relationship building, advocacy, and reputation management. Many in PR thought technology was someone else's job. Today, if you're in communications, technology is your job. You're expected to identify, manage, and guide all communications, especially communication over the Internet and through social media channels. Although PR alone doesn't solely own social media, you must still direct the communication on behalf of your company. Guiding communication requires a deeper understanding of not only how technology works, but also how it facilitates better interactions with the public.

As a result, PR Practice #3 was born...the **PR Technology Tester (PR Tech Tester)** is the PR person who takes the time to research, test, and implement technology as a part of his function. Being a PR Tech Tester touches almost every part of the Social Media Strategy Wheel, from monitoring and channel distribution to the tools you use to strategically identify influencers and the platforms you set up to measure social media return on investment (ROI) (see Figure 3.1). Most students graduating high school and college already make technology a part of their daily lives. Technology naturally blends into their working hours, as much as it does into their personal lives. It's no different for the more seasoned professional, with years of experience; although perhaps it's more of a challenge. However, even if you didn't grow up with technology in your home or classroom, it doesn't mean you can't roll up your sleeves and experiment today.

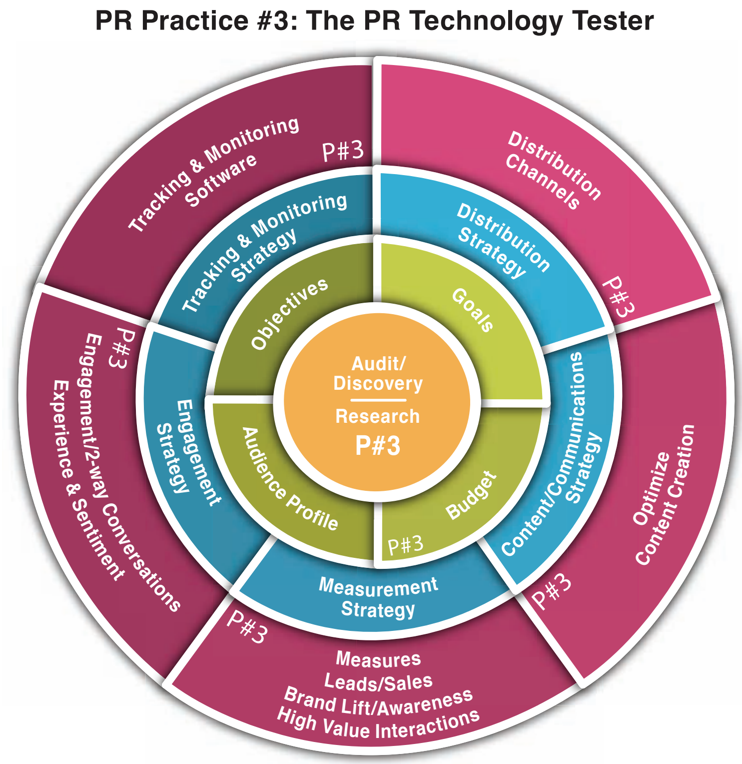

Figure 3.1 The Social Media Strategy Wheel: PR Practice #3

PR people must take the time to learn the basic technology, which includes social media monitoring and measurement, tools to gauge influence, backend content management systems (CMS), website analytics software, Social Media Release (SMR) tools, and finally, different collaborative networks, from Facebook and Google+ to Twitter and Tumblr. There's a long list of technology uses and you start to dig deeper into technology when you create a social media plan. For example, technology leads to better monitoring and tracking strategies; technology connects your company to constituents through content creation and your channel strategy; and technology helps you to develop a better measurement strategy.

When you get into the routine of practicing daily technology habits, you can quickly learn there are tech tasks you can accomplish on your own, with ease and without the help of a web or IT person. When you're empowered to roll up your sleeves to learn technology, it's a rewarding process. What exactly does this mean for the time you spend with this new PR practice? Well, it requires adopting a different mindset and taking on some new procedures. The more you immerse yourself with different platforms, applications, and tools, you realize technology provides an incredibly targeted approach to building relationships by reaching particular groups directly, creating interesting stories and content, and measuring your progress with more accuracy. The Internet provides information at your fingertips. The day you started using the Internet was the day you became more strategic and less of a PR "paper pusher." You should begin right now with your own technology research and experimentation.

What Are the PR Tech Tester's Responsibilities?

The PR Tech Tester begins with due diligence, which includes a cost benefit analysis to determine the best technology, platform, or tools to include in your PR 2.0 toolkit. Your new tools can help you to share great stories, to reach the right people, and to create brand champions. Of course, you must consult with your web or IT team, especially if it's a resource that needs to integrate with an overall organizational system. You also have to receive buy-in from your senior management team, if the technology requires a budget. In the past, depending on the technology or the tool that was needed, the process didn't necessarily start with you and your PR peers. It's great to have direct access to resources you can review on your own, make comparisons, and then digest the information to make an informed decision. The Internet and social media made this more than a possibility; it's your new reality.

It's energizing to be in a position to research, demo, trial test, evaluate, and then decide what technology best suits a particular program or helps with the productivity in your own department. Of course, the PR Tech Tester is no small role. It's a critical part to improve your business communications. Suddenly communications professionals are selecting the tools and resources that help with productivity and program effectiveness. Before, you were trained and then used the technology to implement an initiative. However, being a part of the evaluation and the selection of your own tools leads to feeling empowered and inspired to take a deeper interest in the overall success of the technology's use.

There are different levels of communications technology testing, from the smaller specialized tools to the larger platforms. Regardless of the size or scope of the technology, the PR Tech Tester is happy to do the comparison shopping and demos/trials necessary to make decisions.

However, there are challenges. Understanding where and how to communicate on behalf of a brand, and knowing how to use the appropriate technology, tools, and platforms, is an ever-changing process. It's also good to know when you dive into technology, from research through to implementation and measurement, that you become more of an asset to your organization. Knowledge and skills that make you stand out, and which offer new and valuable information, are worth the time and effort that go into the evaluation process.

If you've been appointed a designated member of the Social Media Core Team (introduced in Chapter 1, "Practice #1: The PR Policymaker"), or if you're on the Social Media Coalition (the champions who form in different departments), deciding on the appropriate technology is your focus. Or you might not be officially assigned to a team, but you're an enthusiastic employee who just wants to share newfound technology knowledge to your peers. Researching and learning technology is not only an eye opener for you, but also an efficiency booster for your programs. For the many executives with complaints, and for those companies that thought allowing their employees to "play" with technology and social media was a time waster, please think again! Being in communications doesn't mean that you have to invent technology or be a web programmer or an applications developer. On the contrary, being the PR Tech Tester means that you help your web and IT departments by not asking them a hundred questions every day. You're also speaking the language of other marketing pros you work with, and you understand some of the technology that they use. At first you may feel like you're speaking a different language, but you'll find it's a more accepted and universal language.

For PR professionals, following are the basic categories of technology:

- Social Media Monitoring and Measurement Tools
- Website Analytics and Measurement
- Social Media Influence Tools
- Collaborative Social Media Platforms (social networks, micromedia video sharing, photo sharing, niche networks, and so on)
- Content Management Systems/Blog Platforms
- Social Media Releases versus News Wires with PR 2.0 Capabilities

All these types of tools and platforms can help the PR Tech Tester to be more strategic by using the most updated technology knowledge in your programs. Technology helps you to build the foundation for a successful program, whether it's used to strengthen your monitoring/tracking program, guide your distribution/channel strategy, aide in content creation and optimization, focus on your measurement strategy, or identify a better engagement strategy. Of course, these are the basic areas of focus. There are other areas of technology to explore as you become more advanced and you work technology into your PR programs.

At some point, you also want to explore how to use technology for your contests, sweepstakes, and promotions. In addition, as mobile usage continues to increase, and more members of your audience access Facebook and Twitter through their smartphones, you must consider mobile applications as a means to enhance your connections and build loyal customers. As you open your world to technology, you can also become mindful of particular applications and customized tools that work specifically for Facebook, Twitter, blogs, and so on. Technology will continue to advance and change, so you should start with the basics first and work your way up to more advanced tools.

Following is a breakdown of the basic areas of technology and how you can use tools, applications, and platforms to create a strategic PR and social media program.

Social Media Monitoring and Measurement Tools

A discussion about social media monitoring tools could be another book—there are so many great tools and platforms for you to consider. The key here is that you take the time to consider them as a part of your social media planning process. The Social Media Strategy Wheel carves out a separate section just to highlight the importance of social media monitoring and tracking, which is critical to the success of any communications program. When you turn on your "Listening" exercise through keyword searches, it stays on for the duration of your PR initiative.

In social media and public relations, you now hear many professionals talk about "Listening." Go to an industry conference, read blogs, and review articles...they all discuss this listening process. Social media requires you to listen to conversations through the use of search and keywords. These keywords should specifically relate to your company's name, products, services, executives, competitors, and industry trends. When you determine your keywords, usually through the use of Search Engine Optimization (SEO) techniques, you will be much more in tune with what your constituents are saying, how they are searching, and how you can join in the discussions to provide valuable information based on what you've heard.

The social media universe is broken into many different networks. Thanks to Brian Solis, author, speaker, and principle at Altimeter Group, and Jesse Thomas, founder and CEO of JESS3, and their famous infographic, The Conversation Prism, you can view a confusing landscape with certainty and organization.[1] When you have a better handle on how the networks are represented and the many platforms within each network, you can select and go into any platform manually or use social media monitoring tools to identify/search relevant conversations for your company. It's an eye-opening experience when you realize the many places your brand can engage with meaning based on conversations currently taking place. On the flipside, you may think you need your company to engage in conversations in a network, and you discover it's not necessary because there are no discussions relevant to your brand.

As a PR Tech Tester, you will immediately notice many of the social media monitoring platforms today enable you to track daily conversations (buzz) across platforms, which quickly uncovers your Share of Voice (SOV) in any given platform. Of course, to properly track your SOV, you also have to track against your competition. As you drill down the conversations through keywords, you can also get a good idea of how customers and other important groups view your company's brand sentiment and even the sentiment about the content you share. These platforms also offer information on key influencers who may be interested in what you have to say, the geography of your audience across the globe, word cloud formations revealing relevant topics, and top domains in which the most relevant conversations take place. In some cases, you may compare other company data (sales, web, and marketing) to your social analytics with overlay maps. Selecting the right social media monitoring helps you to strategically put a system in place, giving you a tremendous amount of research—from trending topics to the critical issues of the people you want to reach.

To select your platform for monitoring, you can use a simple matrix approach to evaluate what the vendors provide versus your own program needs. Identify your tracking and monitoring requirements, and then compare them to the many services the providers have available in their platforms and at what price points. You should check whether the subscription is based on a set number of mentions, if it's a monthly licensing fee (per user) or by the number of keywords you set up for the monitoring program.

[1] Solis, Brian and Thomas, Jesse, The Conversation Prism, www.TheConversationPrism.com, 2008.

Make sure you demo and then trial the software to assess your comfort level with the tracking, charts, and reporting features. Remember, you will use this information for weekly, monthly, or bi-monthly reports to executives. Your executives will be more concerned with reputation (sentiment), SOV versus competitors, and how awareness has led to a higher click-through rate on the company's website. They will also want to see how social media data correlates to other data, including website analytics and sales. Of course, your monitoring and tracking should prove how social media creates registrations, leads/sales, saves the company money by answering customer service inquiries, creates awareness and thought leadership, and provides a brand lift with positive media/blogger and customer endorsements.

Some of the good (and free) monitoring and measurement tools include Addictomatic, bit.ly, Facebook Insights, HootSuite, MonitorThis, Social Mention, Brand Monitor, TweetDeck, Wildfire, Wordle, Topsy, BackType, and BoardReader.

A few of the paid service providers with good monitoring and measurement platforms include Alterian SM2, BurrellesLuce Engage121, Cision, CollectiveIntellect, Converseon, Lithium, Meltwater, Prosyna, Radian6, Sentiment Metrics, Sysomos, and Vocus.[2]

Website Analytics and Measurement

PR professionals are getting more familiar with the value of website tracking and analytics. Where social media monitoring ends, website analytics begin. Typically, PR professionals have relied on the marketing and web team for website analytics. But, with your social media programs and stories driving people to your company's website and newsrooms, how do you rely on someone else to benchmark your success?

One of the easiest and well-known analytics tools is Google Analytics, with its simple reporting of website user statistics. Other free or inexpensive analytics tools include Clicky, Reinvigorate, and GoingUp. Depending on the size of your company, you may have WebTrends or Omniture as your website tracking system. However, large or small, the reports are readily available and easy to read, with information that tells you if your efforts to share customized stories resonate with the people you want to reach, resulting in more website activity.

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[2] Socialmedia.biz, "Top 20 Social Media Vendors for Business," January 12, 2011.

Several of the best analytics, for PR professionals to review, include the following:

- **Number of visitors and page views:** Shows you if your traffic is increasing to your site daily.
- **Referring keywords:** Identifies the keywords that are used the most to find your website.
- **Recent visitor locations:** Where visitors go before they come to your site (including social networks).
- **Inbound link monitoring:** The links that visitors click to get to your site.
- **User profile data:** Provides you with a view of what you need to know about your visitor's surfing habits, allowing you to tailor their experience so it's more enjoyable.
- **Bounce rate:** The rate at which people come to your site and then leave immediately or "bounce" off of your site.

For analytics, the PR Tech Tester should pay attention to the advantages of real-time analytics. You should focus on capturing what's going on in real time, which tells you if your site is doing better or worse at any given time. Some of the more useful analytics include how many of your active visitors have actually been to your site before and how long they stay and whether it's every second or for the last hour. You should also concentrate on how many people go to certain pages of your site, revealing the most popular areas. When you see that some pages are more popular, you can re-evaluate and often adjust the content on the less-visited pages. You need to look at who is visiting your site in terms of their location (city or country) and how many people come from any given place at once. This could be tied directly to what you do with a social media or web marketing program. Finally, take note of where your traffic comes from and what keywords are sending the most people to your website. This information is most likely also tied to your campaign content as the numbers increase.

Social Media Influence Tools

When you discuss online influence or social media influence, from a technology standpoint, it's an algorithm that helps you to capture the most powerful people in your network. However, there are different algorithms based on the tools you choose. For example, one influence tool might calculate variables including reach, amplification probability, and overall network influence (Klout). Another tool might measure different criteria, such as impact, engagement, clout, signal, and the velocity, which you share (Twitalyzer). Another tool may focus on reach, resonance, and relevance (Traackr). These are few of the many influence tools available for you to use in your research process to identify people who can help to share your company's content as potential brand champions.

According to Derek Skaletsky, vice president of business development at Traackr, influence is directly related to creating a voluntary action:

> At its base level, the definition of a person's influence is easy and generally agreed upon. One's influence is equal to their ability to create voluntary action. That action can be anything from clicking on a link; to driving a purchasing decision; to changing one's opinion on a topic; and so on. Defining influence is the easy part.
>
> The hard part is trying to understand and predict one's *potential* influence. Because when it comes right down to it, isn't that what we're all trying to do? Any PR professional is interested in an outreach target's influence (whether off- or online) in the future. *If this person talks about my client's product, service, platform,....how many people will he/she be able to influence into action?*
>
> To best predict someone's potential influence, you have to understand three things: Audience Size (how many people actually tune in to this person—we call it Reach); Audience Engagement (are people actually reacting to what this person says—we call it Resonance); and Relevance (how relevant is this person to this particular topic). These three elements combined are what give the most accurate prediction of a person's potential influence in any given topic. Missing any one of these (especially Relevance) just isn't accurate enough.
>
> Understanding influence is essential to any PR pro. And, conceptually, it's not any different than what PR has been doing for years. At a high level, the decision about whether to focus outreach on niche-trades versus mass-media outlets; on whether to book *The Daily Show* versus *The Tonight Show*; on whether to give an exclusive to one journalist versus another has always been about influence. Being able to predict one's ability to affect your target market is at the core of the PR function and skill set.

> What I think has been lost in the hype of *Online Influence* is the strategic rigor that goes into the thinking around "influence" in the context of PR planning. The idea that influence can be distilled down to some magic number, which will serve as the silver bullet for a campaign, is simply not true and represents an era of very lazy PR. Understanding the influential voices in a space as well as their potential to influence your efforts is very important. But, understanding that this information is not the end of your work, but the beginning, is essential. The people we have seen have the most success in this world have used "influencer" data very strategically and integrated this work into their overall campaign goals.

Remember, many factors create influence, and you need a balanced approach that extends far beyond the size of someone's network. Although a part of the equation, it's not the determining factor. There are consumers who rely on an influencer for knowledge, and most influencers have varying network sizes. Influence is also based on other characteristics including passion, trust, motivation, and, of course, the value of the information shared.

Several of the good social media influence tools include Crowdbooster, Klout, PeerIndex, Traackr, and Twitalyzer.

Collaborative Social Media Platforms

The social media landscape is constantly changing with new collaborative platforms popping up daily. At the same time, platforms less popular go by the wayside, as consumers select the platforms where they prefer to connect with peers, share their interests, and spend their time. As a PR Tech Tester, it's your job to know the platforms where your audiences congregate and the technology and experiences they prefer. One of the best ways to keep updated on the latest platforms is to subscribe to blogs/bloggers that report on technology, social media, and latest and most interesting collaborative platforms for businesses.

For example, Mashable.com, TechCrunch, GigaOm, The Next Web, and ReadWriteWeb can give you insight and news on technology and what's currently considered "hot spots" for your audience. You can also follow influencers who have a great grasp of PR, but who also move beyond PR to provide a well-rounded view of social media, technology, and business. Although there are many, several of these top influencers to add to your RSS include David Armano, Jay Baer, Chris Brogan, Jason Falls, Jeremiah

Owyang, Brian Solis, and Valeria Maltoni. You may also want to consider following them on Twitter, adding them to your Google+ circles, and subscribing to their Facebook feeds.

Doing the research is only half of the work. If it's a platform you feel would benefit your company, you should start monitoring the conversations on the platform and even build a personal profile to check out functionality and use and observe how people like to connect and participate. For example, you need to think ahead to figure out the questions your CEO or senior executive will ask you about new technology. If a member of your executive team asked you right now, why millennials use platforms, such as Tumblr, would you have an answer? Would you know why a brand would benefit from Pinterist? At the time of this writing, most executives are aware of the excitement and potential of Google+ brand pages. Their public relations professionals should be researching, learning, and using Google+ to report on how the platform works best for brand interactions and an engaging customer experience. You should take the time to get a good feel for the Circles (the way you group your friends together to share more targeted stories based on interest), the Hangouts (the video chats you can have with different people), and Sparks (areas of interest that you want to follow), so you're ready to set up a page for your brand and have a reason and a strategy to participate. There is no shortage of articles, videos, and soon-to-be-published books on Google+.

Part of your job as a PR Tech Tester is to read and review as much information about new platforms and tools. Then, make it a part of your weekly process to test the new technology for possible company use. Although each week may be extremely busy, one of your weekly goals should be to tackle a couple new technologies. A best practices approach is to set up your own personal checklist system or To Do list through a software application. Using technology personally to stay organized is critical. For example, Evernote is software designed to help you with your note taking and the archiving of important information you want to remember and keep organized. Evernote enables you to stay orderly with your To Do lists or notes, especially when you stumble across tools, resources, and platforms you know you want to explore but can't take the time to research or test right away. Other note software to stay organized includes SpringPad and SimpleNote.

PR Tech Testers are also good at filtering conversations by researching the best hashtags to follow on Twitter. For example, if you're interested in Google, follow #Google; if you want to learn more about

Facebook, follow #Facebook; and if you want to find out about PR measurement, plenty of professionals, educators, and students talk on #MeasurePR. Also public relations industry hashtag conversations and communities cover information about new technology, including #PR, #Marketing, #SocialMedia, #PR20Chat, #MMChat, and #PRStudChat, to name a few.

Of course, being a PR Tech Tester requires time and commitment, so you must select the most relevant hashtags. Avoid the conversations you follow becoming too noisy or overwhelming. Also, when you contribute to the hashtag conversations, by asking questions and sharing the information you've learned, you'll get a quick understanding of what you're researching and why it might be valuable for your company's social media outreach programs. Your peers will be happy to share their good and bad experiences through aggregated hashtag conversations.

Content Management Systems (CMS)/Blog Platforms

As a PR Tech Tester, you must know how to use a CMS to create and share stories about your company. Today, PR professionals are becoming skilled at uploading and managing their own content (from blog posts to photos and videos). You also need to know and understand CMS because you work more with Web, IT, and marketing to coordinate how information is shared through either the company's blog or community website.

Become familiar with a few of the key differences between various CMS platforms. Now that you're listening and observing people and behaviors in web communities, you want to make sure your technology selection helps to build better relationships with these constituents. A few of these platforms include Posterous, WordPress, Drupal, Joomla, and Vignette; consider each one for its capability to enhance the communication and experience between parties on your site. The PR Tech Tester needs to examine the best ways for a brand to build dynamic blog communities and what types of platforms or technology can serve this purpose.

For example, when you discuss two-way communication, sharing social objects (blog posts, video, podcasts, widgets, and so on) and how to build an interactive community, should your brand use Posterous or WordPress? Maybe you need a more advanced CMS, such as Joomla or Vignette? Researching the different types of platforms helps you to identify the capabilities and functionalities that suit the needs of your brand and PR program initiative. You should identify the best use for different types of CMS by reviewing endorsements from some of the well-known users (in the form of case studies). Make sure you compare the satisfaction levels with the price point. And remember, you need to think about every step of communication and the technology that helps to make interaction and collaboration for your target audiences successful.[3]

For starters, following are a few key differences for CMS and what to use based on what you need:

- **Posterous:** Used for a blog, uploading, and sharing photos, videos, and audio. It's free and easy to use.
- **WordPress:** Used for a blog, home page, and uploading and sharing photos and videos. WordPress makes the latest blogging technology available to its users, including Trackback and Pingback, which are great ways to build links and traffic to your blog. WordPress is free, but you pay for customized templates or design services if you want a more customized website.
- **Drupal and Joomla:** Used for blogs, home pages, uploading photos and videos, e-commerce, ad servers, and community features. Drupal is free, but it's open source. There are plug-ins you can use, which may require an experienced programmer for the install. Joomla is also free, but you need assistance from designers and programmers to build and maintain the platform.
- **Vignette:** Everything mentioned previously, and you can practically add in the "kitchen sink." Vignette is for large businesses with big budgets that want major customization on their websites and want interactive features, such as reservations and online payments.

Of course, doing the research and making the recommendations is critical, but you also must coordinate with other departments including Marketing, Web, and your IT team, should the CMS require more advanced functions, such as in the case of Joomla or Vignette.

Social Media Release Platforms/News Wires with PR 2.0 Capabilities

Because the media landscape has changed, you will be faced with decisions about how you want to share your business stories with the

[3] Entrepreneur Magazine Online, "The Juice Behind Your Website," May 14, 2010.

public. As a PR Tech Tester, you realize there are several options. One option is the use of a wire service that has ramped up distribution capabilities to include 2.0 functionality and reach. Several of the wire services, including BusinessWire, PR Newswire, Marketwire, and PRWeb, have the capability to distribute your news releases beyond traditional print, broadcast, and online media outlets to reach bloggers and consumers through RSS. They also use multimedia in their release templates including video and audio clips. There's commenting, track backs, and sharing capabilities via social media networks as well as search engine-optimized releases, so your story can be found easily.

On the other end of the release spectrum is the Social Media Release (SMR), which is a community tool for sharing news and customized stories. A true SMR does not cross the wire, but rather uses the pull method of sharing. People who find the release valuable share it in any number of networks with their friends and influencers. The SMR is highly interactive and is housed on a blog platform. One useful platform for PR pros is PitchEngine, which enables you to create what the company calls a Pitch, or a customized story that goes live. SMRs are also search engine optimized making it easy for your story to be found, shared, and discussed by any number of communities. Bloggers, journalists, and consumers rely on the SMR for a more transparent and human story. Many realize the value of SMR for its rich content and the engaging content that it shares.

As a PR Tech Tester, you also must be aware of the latest newsroom technology that can transform the online newsroom into a social newsroom, including how to create and share compelling content, which also provides the tools necessary for journalists and the public to find your latest stories. PR professionals are learning how an online newsroom can extend beyond journalists to reach a new audience of bloggers, customers, investors, analysts, suppliers, partners, and employees. Focusing on a much broader audience is the next step in the evolution of online newsroom technology, which opens the door to a new world of PR/content marketing.

Being a PR Tech Tester and finding the right technology for your PR toolkit involves trial and error. But as the PR Tech Tester, you need to roll up your sleeves to experiment. Gone are the days in which the PR person has to wait for the digital marketing team or IT to evaluate and recommend technology. You don't need to wait to upload your company's blog posts, news releases, photos, presentations, or videos into your newsroom. CMS makes this simple to accomplish. It's a new and exciting role, and suddenly communications and technology makes sense. Although additional work is required, in essence, most of the useful technology you uncover can ultimately add to your team and your own PR productivity.

What Are the Best Practices of the PR Tech Tester?

Jason Kintzler is the founder and CEO of PitchEngine, a social publishing platform used by more than 45,000 businesses worldwide, including Fortune 500 companies such as Pepsico, H&R Block, and Zappos. As a former anchorman turned PR pro, Jason offers some best practice technology tips for PR professionals.

Q: What are some tips for PR people who want to learn more about social media and technology but don't know where to begin?

A: It's always good to see what your peers in the industry are doing. New technologies launch almost daily, but it's important to understand how they're being applied in practical ways. The best way to learn how they work is to use them for you. When it comes to social media networks, take the time to listen and understand the dynamics of the network first. For example, by using Twitter on a personal basis initially, I was able to identify some unstated "rules" or ethics about the platform. I could see that Twitter users didn't welcome posting "spam" or unwanted marketing or advertising messages. So, when it came time to use the platform for business, I wasn't out of place and could have more success there. I also recommend following one or two of the popular technology blogs to see what's coming out and if any of the technologies might be applicable to PR or to my clients.

No single tool is perfect for every situation. So, gaining a broad understanding of most popular tools on the market and how they work will help you to address a client's specific need quickly by digging into your toolbox and pulling out the most appropriate wrench. To paraphrase an old adage: Every issue will look like a nail if all you have is a hammer.

Q: What are your favorite networks, applications, and/or tools and why?

A: My favorite tool has always been Twitter. I love the simplicity and the creativity the platform evokes in users. With only 140 characters to post, those long-winded marketers have to tighten up their message and be concise. It forces us to get to the point and doesn't allow for much else. From a PR perspective, recent studies have revealed that most people who follow brands say they do so to be "first to know" about news, promotions, and updates. They're also more likely to buy products from those brands as a result.

I'm also quickly becoming a big fan of Google+. Unlike the closed network Facebook provides, Google's newest social network is open and searchable. It enables users to easily identify influencers around topics and keywords simply by searching. The View Ripples feature provides insight into how posts spread, which is valuable when we're looking at how our PR messages spread across the platform's growing user base. I think it will lead to deeper and more authentic connections between people, topics, and the brands they follow.

Q: Where do you go to learn about new platforms, applications, and tools?

A: Because I'm in the tech space, I tend to get invited to beta test a lot of new technologies. If I want to be more proactive about discovering them, I'll look at blogs like TechCrunch, Mashable, or The Next Web for tips. Further, I follow leaders in the space on social platforms. If I'm not privy to a beta and the latest news, there's a good chance that they will be. Additionally, they'll lend some perspective to their experience with these new tools that I may not have. For example, I don't own a publicly traded company, so the issues specific to that aren't top-of-mind for me. However, some tech leaders do, and when they blog about a new tool, they may approach it from that perspective. There are so many new startups, it can be a daunting task to weed through them all. You'll have to use your own judgment about the time commitment you'll dedicate to diving in to each of them.

Q: How much time do you spend learning and testing new technology?

A: Unless it involves some type of workflow management, I rarely test new technologies during the day. I sign up and take a peek at many of them outside of office hours. I'd say I spend about 30 minutes a day looking at new technologies. To really use and test a service, however, it requires me to use it routinely over a period of about two weeks to really get the full idea of the capabilities of the service and to decide if it fits into my life. The ones that stick will make my life better or my workflow easier. If it isn't contributing to your life, ditch it and move on.

Q: What should PR pros keep their eyes on with respect to new technology and innovative networks to better engage their public?

A: If you want to engage, you need to stop looking for "easy buttons." Don't try to make social networks do the job of advertising. Until now, technology has only provided more delivery or distribution mechanisms. Meaning: If you created unengaging content (like spammy marketing messages or poorly written news releases), technology would only help you blast it out to more people. Yuck! If you want to truly engage people, start identifying ways to generate better content. News releases should include photos and video, and maybe, even some humor or honesty, and be in a "voice" that your audience will find relatable. You are an authentic communicator, a content generator, not a distribution robot. People will read and share great content. Some of these technologies are right in front of you—like the video camera on your smartphone or that recordable Skype interview. Become a storyteller and your own publisher.

PR Tech Tester Check List

- ✓ Adopt a different mindset, and take on a PR new practice by adding technology to your daily habits.
- ✓ Do your due diligence with a cost benefit analysis to determine what would be the best technology, platform, or tools to include in your PR 2.0 toolkit.
- ✓ Determine your budget, which can give you an idea of which tools meet your needs (free or paid).
- ✓ Make technology testing a part of the communications function; realize it's not a one-time deal.
- ✓ Pay attention to what's new in technology from social media monitoring and website analytics to social influence tools and content management systems
- ✓ Read about new technology by following blogs and bloggers who go beyond PR into technology, social media, marketing, and business.
- ✓ Set up a checklist or note system to capture information you want to research; use Evernote, SpringPad, or SimpleNote to stay organized.
- ✓ Learn more about technology by following hashtag conversations on Twitter, where articles and platform advice is frequently shared.
- ✓ Break down the PR Tech Tester practice into various types of technology, and then figure out which technology is a priority, so you can allocate your time and resources to constantly finding better solutions for your company.

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New Practice #4: The Communications (COMMS) Organizer

According to Wikipedia, the definition of the word *process* “typically describes the action of taking something through an established and usually *routine* set of procedures.” The key word here is “routine.” How many routine procedures do you follow in a day? Ten? Twenty? Are there too many to count? It’s easy to get caught up in a routine. Although a process may become routine over time, it’s only kept in place if, and only if, it helps you accomplish your goals. Social media should have caused an immediate change in your process. Unfortunately, many companies were not quick to realize how social media empowered customers to engage differently with their brands. The customer’s demand for immediate and direct communication required old processes to be reevaluated and updated to accommodate a new communications approach. The processes you put in place are just as important as the results you want to achieve. Remember, the process always has to map to the wanted results.

When social media surfaced as a new and powerful means for brands to have two-way conversations with people, there shouldn’t have been any doubt or delay. A change in process was necessary internally in your communications department. If you’re still relying on the traditional communications process to create and disseminate your company’s stories for public consumption and using social media channels...please, reconsider now! Older methods of communications are focused on the one-to-many, a broadcast approach. A broadcast approach doesn’t take into consideration people want to gather, organize, and share news and information with peers. It doesn’t take into consideration how consumers want to communicate directly with the people or the humans behind a moniker. They trust people more than corporations. An older model doesn’t take into account two-way dialogue and doesn’t promote active participation in web communities. The past focused on one-way messaging, which you know doesn’t work in your peer-to-peer networks.

It takes a proactive PR person or team of communications professionals to identify and uproot a long and tired process and literally flip it upside down. This type of process overhaul is critical to the success of your social media communications. Thus, Practice #4 comes to life: **The Communications Organizer (The COMMS Organizer)** is the PR pro who knows an old communications process does not enable the company to reach social media success.

It's time for you to work from the inside out. The once accepted top-down approach to messaging is no longer viable. It doesn't address how people talk about your company and its products and services through social channels, and how you, in turn, should respond. It used to be simple years ago. You could take the messages from the C-Suite (CEO, CFO, CIO...) or your senior leadership team. You would see these same approved messages appear through every touch point of the brand. From your news releases and customer newsletters to your direct mail and corporate brochures, it was a way to control the message. This type of practice never worked, only in the minds of those who were setting the "controls." There is no control with social media. However, you can guide and direct the communication to benefit your brand and the relationships you build moving forward.

What Are the Responsibilities of the COMMS Organizer?

The COMMS Organizer begins by analyzing the company's current communications process. How are messages and content created, prepared, and shared through the organization prior to public dissemination? In the past, most messaging started at the top (where executives have the business' interest at heart) and was handed down to the marketing or communications department for development, routed back up for approval (depending on the communications), and then released by the account team. The account team did the monitoring and reporting and passed the information back up the chain of command. The top players in the process have the business acumen and key messages. The account team that disseminated the information may or may not have the savvy business skills, but are skilled in monitoring, and in many cases are required to field questions or the interest in the communications. In addition, the account team gathered the analytics and created the reports, which may not necessarily align with what the executives in the company needed. There's a huge disconnect when this approach is used for social media outreach and engagement.

When you begin your new practice to evaluate the process for communications, you are identifying several new procedures, which touch almost *every* piece of your social media plan (see Figure 4.1). Start with your monitoring and tracking, which ultimately requires you to re-evaluate the manner in which you release your content in web communities. It starts with tuning into the relevant conversations (through keyword search) that uncover what the people you want to reach need and expect from your brand. More than three-quarters of what you deliver to the public relies on how much you listen, and then hear what customers and other stakeholders ask from you. Perhaps, you may even uncover certain groups that don't want you to connect and converse with them, or have you share content in their communities. To find out, the process must begin with monitoring and observation of the conversations and behaviors of members of the community. This can determine, first and foremost, what people want from your company and your products and services. The messages are no longer handed down from the top.

The listening that's done today happens on several levels of the organization. Because the actual conversations occur outside of the communications department, so does the research and observation function. It used to be that research was done by marketing and PR, and then the information was packaged and presented to the senior team. However, listening through social media can happen on many different levels. It's all members of the company, from various departments that connect directly with your customers through social media. They, too, need to review and use the intelligence gathered. Social media moves across the organization and no longer resides in just one spot. So, in some cases, you have more junior members of the team listening for keyword conversations and managing a community. At the same time, you can have senior-level executives from various departments doing intelligence and responding appropriately on their blogs and networks.

The COMMS Organizer must help create a new process and management of information on a macro level and then have the individual departments manage the process on a micro level.

Intelligence and meaningful messaging require a flatter structure, in which information is shared unilaterally among departments and levels in the company, as needed. Part of the reason for the change in information gathering has to do with the fact that more levels and departments want to engage in social media. Social media champions are popping up in every department, not just communications.

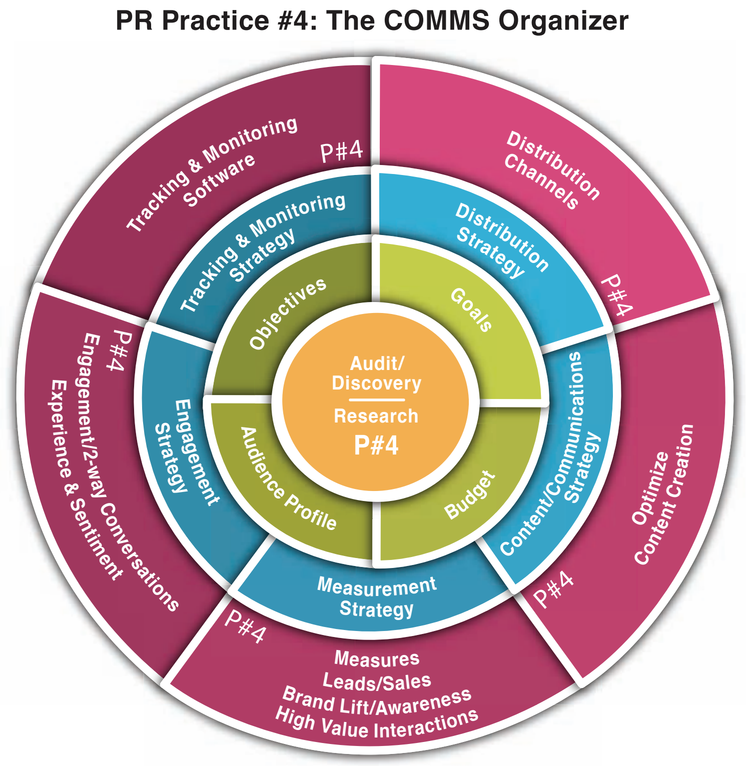

Figure 4.1 The Social Media Strategy Wheel: PR Practice #4

Social media spans the entire organization. You may have the senior team thinking of ways that it can connect with either its own employees or customers directly to show thought leadership in the market. Marketing teams have a reason to participate in social media to share great content and drive traffic to the company's website for leads and sales. Of course, as a PR person, you're ready to listen and respond to the public when they have questions or issues about the brand. The customer service team must be available through social channels to field inquiries about products and services, and aid a customer who has a concern or problem. Human Resources (HR) is also a part of the mix. HR wants to be out there on niche networks, such as LinkedIn, recruiting the top new talent for the company. Then, there's the sales team that want to use social media for networking to find leads and possible sales targets. As you can see, social media spreads across the company, and there is no single department that handles all the communication. Rather, all departments are involved and work together proactively to listen and participate with value to help customers.[1]

The COMMS Organizer is faced with the challenge of helping to introduce and implement new procedures. It's your job to plan the best ways to create cohesive and consistent messaging so that social media does not fragment the brand. You will be involved in setting up new processes that enable communications to accurately flow from the organization; communications that reflect your brand, yet enable an army of employee champions to apply their unique voices (keeping the brand voice in tact will be discussed more in Chapter 7, "New Practice #7: The Reputation Task Force Member"). You will also make sure as social media continues to move quickly through your company; no matter how large or small, new processes in place facilitate better communication.

Following are five new procedures, which help a company to focus on effective internal communications for employees in the company to offer valuable contributions through your social media channels. The new procedures are meant to create more organization of social communications on the inside, as you and your peers work to build stronger connections with customers.

- Setting Up Overall Company Monitoring and Customer Intelligence
- Building a Two-Prong Approach for Content
- Creating a More Universal Sharing System
- Developing a Social Media "Share" Book or Playbook
- Creating the Social Media Purpose Brief

Setting Up Overall Company Monitoring and Customer Intelligence

For overall communications intelligence, PR and marketing monitor the brand and report back to the C-Suite. As discussed, because social media enables various departments to use social media for their own programs, it's important to turn the listening intelligence on for these areas. On the macro level, companies monitor for overall message penetration, reputation, Share of Voice (SOV), and customer service satisfaction levels. Then, on the micro level, there's tracking for specific program awareness, sentiment, buzz or

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[1] Reed, Frank, "Social Media for the Career Minded [Infographic]," Marketing Pilgrim, September 27, 2011.

amount of conversations, sharing habits, community growth, and so on. In a smaller company, the community manager (often in the communications department) gathers all the intelligence and responds appropriately. As the information is analyzed and dissected, it can then be routed to the appropriate areas within the company for response and information to share. However, as a PR professional, you don't want to answer the technology questions (that's reserved for IT). If it's a customer service issue that needs specific handling, it must go to customer service; and if it's an employee who's chatting inappropriately, once again, not your area of expertise—you would send it to HR. You quickly learn that operating in a silo or a vacuum doesn't work. On the contrary, you need to share with those experts or employees who are qualified to answer appropriately.

At the same time, there's a lot that marketing and PR will be doing with respect to listening intelligence, using information from virtual focus panels, and creating content and strategy that map to the needs of your audience. PR especially will always be listening to all customer and stakeholder feedback, whether it's monitoring for reputation or tracking proactively for what looks like a potential crisis. (You learn more about Practice #5: The Pre-Crisis Doctor in Chapter 5.) However, it's important to determine whether you will be doing the overall listening and passing along the intelligence, or if individual departments will monitor on their own and use the feedback proactively. It just may take a social media champion who steps up in each department, joins the Social Media Coalition, and begins the monitoring process (which actually means that department has its own community manager). Either way, the intelligence is passed across the company rather than messages just filtered down from above. The new process leads to much better content development, more appropriate methods of sharing, and deeper interactions with your company's customers.

Building a Two-Prong Approach for Content

You've heard the saying that content is king, but it's also a known fact that context is queen. Developing content means making sure it's shared with meaning and reflects proper timing. In PR, you're used to timing your news or coming up with angles that make sense with what's happening in mainstream news. It was a common practice to offer your company experts for a major news story that impacted your industry. Social media requires you to still listen to mainstream, as well as quite a bit of daily community listening. It's the community conversations that allow you to determine what, how, and when to share your content.

Creating content is a two-prong approach, but before you learn how to develop and curate the content, you first must understand that PR and marketing will not always be the keepers of the content or the social objects shared by other members of your organization. Other departments will create specific social objects and time their sharing around the relevance of their own programs. Depending on your company, PR and marketing might work to develop content that goes across several departments, but at the same time, you can't be responsible for everyone's content, timing, and delivery.

The two-prong approach makes it easier to use some of the content you already have. The first prong is the "Existing" content you need to repurpose so that it becomes social. You can't take your news release and post it on your Facebook page. You can't take copy from your brochure and use it to answer a question on LinkedIn. On the contrary, you can take ideas and information from marketing content and put them into a human voice. You have to figure out if what you're saying actually solves someone's problems or helps them to make a decision. You can also take existing photos and create albums on photo-sharing sites including Flickr, Picasa, or SmugMug, and you can take video footage from events and edit and share on YouTube, Vimeo, or Facebook. When you're short on resources, you can use existing content, with a few tweaks, and figure out the best way to curate it through select social media channels. Based on your ability to listen and respond with meaning, you can abandon the *spammy* marketing messages that insult your social media friends.

When you create your social media plan, you need to evaluate your resources to determine who will do it and how content will be developed. The "Discovery" process, as illustrated on the Social Media Strategy Wheel, is a good time to see if the resources currently in place are enough to move forward to accomplish your social media content goals. Then, moving into the Communication/Content Creation phase on the wheel, you will have clearly identified what existing content can be repurposed and what resources are needed to get this job done.

The next part of the content development requires your search for new content ideas (the second prong in the two-part approach). As the COMMS Organizer, there are several ways you can uncover the most riveting content for your audience. One of the best ways is to listen carefully to the influencers, who drive the community, and identify their critical issues. Revealing the critical issues and then developing content that touches on or solves the issues is always welcome. If you're not uncovering the trending topics, you can also poll or survey your community advocates to find out what the "hot" buttons are. But the best way is to ask them outright…"What do you want to learn, solve, use, create, cause, and so on."

There are also companies that work directly with their customers by crowdsourcing information. Throw a problem out to the community and let them solve it for you. From the interaction and discussion comes innovation in the form of how they want to interact with their favorite brands. However, although a lot of your interaction might involve comments and responses to questions, you may also find out quickly some content you want to create (for example, podcasts, videos, applications on Facebook, widgets for your blogs) requires additional budget.

Crowdsourcing is a great way to learn what your community thinks and what they want from your company. There are global companies using crowdsourcing techniques in marketing communications, as well as R&D and innovation. For instance, Starbucks is a famous example of loyal fans offering their suggestions and ideas to enhance the Starbucks experience. They actively participate on MyStarbucks.com. Tens of thousands of suggestions are generated from this collaborative effort. The result is great content, a better product, and sometimes better service from Starbucks. Another popular example, back in 2010, was the General Electric (GE) Ecomagination initiative. GE created a platform in which entrepreneurs, innovators, businesses, and students could gather and generate ideas for the "next generation power grid." There was no skimping on this crowdsourcing idea with GE and its partners offering $200 million in capital to the winners (startups) with the most promising innovation. Asking your constituents or crowdsourcing to gather their ideas and unique solutions is a great way to not only participate but also to truly engage with people.[2]

The COMMS Organizer must think about the pieces to build the content process to truly get the right information and great collaboration jumpstarted. Whether you start with your existing content and tweak to socialize, or you take the listening approach and gather ideas for content,

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[2] The Insight Exchange, Future of Crowdsourcing Summit, "Five Great Examples of Global Companies Embracing Crowdsourcing," November 2010.

the reward in the end will be a better connection, which ultimately leads to a deeper relationship.

Creating a Universal Sharing System

Moving away from communication in silos and built on years of routine procedures is no small task. Making the change might require incremental phases. First, you may set goals to show some small wins in your own department based on a new process. When different groups build social media channels, focus communication around their own initiatives, and don't share or support overall brand communication, social media does not work for the company as a collective whole. Clearly, social media is working only for individuals or small groups. To make social media work for the entire company, there must be a coordinated effort from the development of the content to how the information is shared.

As the COMMS Organizer, you know businesses today are not run by individuals but by teams of people who work together. The success or failure of a social media initiative depends on how well the team or teams collaborate and perform. Social media in the organization should not be a series of parts working independently. On the contrary, you need to look at how the whole engine functions—the combination of the people, their collective innovation, and the synergy they create to get the job done. Teams working interdependently always outperform those working in a vacuum.

The creation of a Universal Calendar System enables the Social Media Core Team to work with the Coalition (department champions and other employees) that want to cross-promote their programs through the main company Facebook pages, Twitter feeds, YouTube channels, and so on. The Universal Calendar is designed to highlight different events, broken down by themes, areas of focus, and keywords common to the company and may be promoted companywide. Your social media audit may uncover how different social media properties are not cross-promoted and do not support one another. A Universal Calendar can also enable members of one department to be tuned into the programs and activities of other departments occurring during the calendar year. Universal calendars can also be developed specifically for different departments to preplan their sharing of weekly/monthly content. The Universal Calendar System is housed on a collaborative internal platform and coordinated by the Social Media Core Team. The calendar helps everyone work together to maximize the impact of a shared effort.

Developing a Social Media Playbook or Share Book

The COMMS Organizer should be involved in developing a social media "share" book, or what's commonly known as the social media playbook. The playbook is an essential part of overall social media strategy or can be used for specific program initiatives. Jay Baer is one of the top social media consultants in the United States, co-author of *The Now Revolution*, and founder of the popular Convince & Convert social media blog. Jay shared his thoughts on how a social media playbook unifies the organization's social media strategy and keeps the employees on the same page.[3]

Q: From your experience, who is responsible for creating the social media playbook or share book in an organization? Should the PR department be involved in this process?

A: Initially before the operational element, it's a Noah's Ark approach; all corners of the organization are involved. Collectively employees can decide what the playbook look like, what it should contain, and how is it used? You often see customer service, legal, operations, sales, PR, and marketing coming together as a cross-functional effort. Some of the issues I've experienced when it comes to embracing the cross-functional thinking are that the committee is created by business card. People are appointed to participate; the head of IT, the head of legal, the head of operations, solely based on their job functions.

However, your title doesn't determine your social media experience. Social media merits experiential learning. If you don't love social media, you might "suck" at social media. It's important to find the people who have the passion for social media and include them. It's those employees that spend their nights and weekends using social media, whether they are natural champions in the organization or the people who just love social media outside of their job function.

Q: Are PR pros responsible to successfully communicate the value of the playbook to get their team members, other departments, and all employees on board?

A: There is an opportunity for PR professionals to communicate [the value] the playbook, but it's still a cross-functional effort right down to who introduces the playbook. For example, if a single area of

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[3] Baer, Jay & Naslund, Amber, *The Now Revolution*, first edition, Wiley; February 8, 2011.

the company introduces a playbook, then it's looked at through that prism. Unfortunately, there can be baggage that goes along with that. If the company's legal department introduces a playbook, then everyone expects the book to be about the lawyers and their needs. The ideal scenario is to have PR, Customer Service, and Human Resources working together to communicate the value of the playbook, especially if there is an opportunity for all employees to get involved ad hoc, and in a more natural way. It's important to realize that every employee is in marketing and customer service. Customers don't necessarily call the 800 number for help through an "official" channel, but rather reach out to anyone they can on Facebook. The companies that are great with social media on the outside are the companies that are also great with social media on the inside.

Q: What are the most important components of the playbook?

A: I think of the playbook as a strategy cake with operational frosting. A playbook has to make people understand why they are using social media. For example, it answers the question, "Why are we active in social media?" They also have to understand what will make their efforts stronger and how the company is going to measure social media. Focusing on the measurement and sharing the analytics is so important. If you can't trust employees with social media statistics, you don't have a social media problem, you have a hiring problem. The more specific you can be about social media measurement, and the wider you can distribute the information, the better off you will be.

Q: Can you give an example of a client using a social media playbook? Did the playbook make a measurable difference?

A: A great example of a client using a social media playbook is the marketing agency, Bailey Gardiner. We worked with the agency when it started out in social media and employees were blogging about seven to eight blog posts a month. There were also a handful of people on Twitter and Facebook. Through the use of a playbook, the company asked all employees to contribute one blog post a month. As a result, its seven to eight posts a month turned into more than 20 posts per month. It saw its website traffic increase six-fold and its inbound leads skyrocketed. One of the most impressive results of the playbook was that digital and social media services revenue at the agency increased significantly. The company experimented with its blog posts and actually wrote about companies that it wanted to work with. Because Bailey Gardiner was smart about search and the use of the right tags, two of the companies reached out to them as a result.

For any employee resistance, there's always some hesitation in the beginning. With the phones ringing, emails non-stop, and something to do at the agency at all times, it's difficult to balance social media with other work responsibilities. Some people may have thought that social media was a time waster; however, the positive results including the increase in traffic and actual sales for the agency was proof of the playbook's value.

Creating the Social Media Purpose Brief

The Social Media Purpose Brief is definitely a common missing piece in a social media program. The Brief is not meant to stifle social media or make people feel like there's more paperwork to be created. Rather, it's meant to make sure the social media profiles initiated on behalf of the company have a strategic purpose and will be administrated properly for success. The COMMS Organizer needs to create a Social Media Purpose Brief, so everyone interested in social media understands they are accountable for their profiles.

It's not uncommon that process is often overlooked because everyone gets busy with daily department work and resources are usually scarce. When everyone is in multitasking mode, there is a natural tendency to think someone else has a process covered. It's important that social media profiles and pages are built with purpose, so you need to create a system that enables your Social Media Core Team to evaluate and help a department properly set up a new profile.

The Social Media Purpose Brief includes the following information, which needs to be filled out and reviewed by the Core Team, the department head, and so on, depending on the size of your company. Following is the information you should consider capturing from groups in your company that want to start a social media program and set up a profile on Facebook, Twitter, blog, and so on:

- Sponsoring Department/Program
- Social Media Purpose Brief Date
- Type of Social Media Initiative
- Strategy/Purpose of the Initiative
- Goals/Objectives
- Target Audience
- Execution/Maintenance of the Profile(s)

Ensure the information is reviewed and there is a process in place to prevent countless social media profiles from popping up across the social landscape with little purpose or passion. These channels usually end up as abandoned channels or social activities that don't reflect your company brand voice. Remember, you can cut down on paper by making this an online form for submission. The COMMS Organizer can help to keep the social media effort coordinated and on track.

The Social Media Purpose Brief serves an important purpose for higher education, as pointed out by Joseph Provenza, CIO at Flagler College:

> We live in a world where everyone can get the kind of exposure formerly reserved for celebrities. A lot of people want a piece of that action. However, an organization must be very purposed about its social media voice lest it gain the kind of publicity that no one wants. In addition to this, some best practices in social media remain undefined. Who is to say that the janitorial staff at a college should not have a social media presence provided that they have someone who is capable of providing good, if not unique, content that fits within the college's voice?
>
> The real question is, "What are we trying to accomplish with our social media voice?" That leaves room for many different areas to have a voice, provided there is some purpose to their existence in the channel. It may be a voice to disseminate information that is key to the students and their parents as they apply, register, and pay the bills. It may be to continually share the vision of the school so that potential students know what they are getting. It may be to show that the school has a fun side. In each of these examples, you can imagine who might be the voice, and it isn't always the same voice. However, social media with no purpose will likely send a very different message, which is the school doesn't really know or care who it is or what it is trying to say. Therein, a purpose statement for any proposed social media voice that is under the governance of the operation, which is ultimately responsible for the message, is critical. Let's call it the "organized chaos" approach.

What Are the Best Practices of the COMMS Organizer?

Priya Ramesh is Director of Social Media at CRT/tanaka. She works closely with her agency's clients on new communications processes to strengthen social media programs and the results of their clients' campaigns. Priya answered several questions, which focused on her work with Network

Solutions and Charles Schwab. Following are a few of Priya's thoughts on public relations, a changing communications process, and adjusting the PR person's mindset to pay attention to new ways to think to engage with consumers today.

Q: How do you think the communications process has changed in the PR department?

A: In 2007, social media was related to blogs. Twitter and Facebook were just surfacing. Companies didn't talk about being in "listening" mode for intelligence. It was the widespread growth of Twitter when consumers realized they could air their concerns and complaints. Suddenly, Twitter became a customer service platform. Companies woke up and recognized that there was a whole universe of conversations going on without them. However, it was a different conversation, about the companies, their products and services.

One of our clients, Network Solutions, a company known for domain names, web hosting, and online marketing for small business websites, saw a lot of complaints through its Twitter and Facebook profiles. In 2008, most of the conversations were negative, almost 60% at the time. We suggested an audit to review the sentiment and to see if it were a specific product issue, or if the negative conversations were related to the culture of customer service. It was time to uncover and address what its customers, which included developers, designers, and small business owners, were thinking and how they really felt about Network Solutions. Of course, the information obtained from the audit was used to help Network Solutions answer customer questions, solve problems, and directly address their concerns.

Only when customers are talking, and it's mostly negative, PR departments in corporations and on the agency side started to use a listening strategy.

Q: Why did it take social media to change the process?

A: Before social media, professionals in public relations and communications used to have this self-fulfilling prophecy. We would send out a news release or a newsletter and thought that this was a type of dialog. Pre-social media, we may have thought we had two-way conversations, but we never did. There was no way really for us to find out the customers' reaction. No technology was in place that provided us with real-time data and feedback about our customers. Thanks to social media, customers became empowered. Our audiences had the ability to let us know how they felt about their brands. At this point, we had to change not only how we created content, but also how we communicated with the public.

Q: Do you think companies are doing a good job at listening to their customers and other constituents to learn what needs to be communicated through social channels?

A: There's a huge gap that exists. The digital natives have closed the gap between what they uncover in conversations and what they do with the information. Dell is a good example of truly listening and taking action. However, not every industry is as far along as technology. In many cases, companies are hardly asking questions or crowdsourcing with their customers. It may not be that they don't want to; they may not know how to begin this exercise. The PR professionals for nontech companies have a larger challenge. There is often more resistance to social media and the potential opportunities to use listening for great customer feedback.

Q: Do any of your clients use polls and surveys, or do they just come out and ask what their audience wants them to share?

A: In 2008, we went back to the Network Solutions executive team with all the negative sentiment we had uncovered and told them they needed a listen and respond strategy. It was at this point when Shashi Bellamkonda, director of social media, was the face of Network Solutions. As a community manager, Shashi became known as the Social Media Swami, which brought both humor and was a great topic of conversation. Shashi went back and neutralized all the negative comments on the Network Solutions Twitter feed and Facebook page. He responded personally to the customers—in his words, not canned. His efforts were focused on the issue, often apologizing for the experience and letting customers know that Network Solutions was there to help.

As a result of prioritizing and responding to the negative comments, the new human approach decreased the negative sentiment dramatically within six months. Network Solutions listened, asked questions, and then used the information. For example, they would turn frequently asked questions into blog posts to help customers. Network Solutions focused on "what can we do to help your website." We identified a Monitor/Listen/Response strategy that led to action. We also populated a document to review the complaints, which allowed us to produce FAQs and content to better serve the needs of Network Solutions' clients.

Another good example of a client using crowdsourcing for corporate social responsibility is Charles Schwab. It has a program for charitable donations called "Schwab Gives." The initiative launched to engage the community in supporting the work of select local charities in Denver. Every year during Schwab Volunteer Week, thousands of Schwab employees across the U.S. receive paid time off to roll up their sleeves and pitch in at local nonprofits. Traditionally, Charles Schwab Foundation matched employees' donation of time and energy with a $500 grant to each participating organization. What's new this year is Schwab will donate an additional $10,000 to one of these nonprofits, based on the people's choice. The public was invited to cast their vote on Facebook for the organization they would like to see get the additional $10,000 grant.

Q: What are some tools or types of training that your clients use internally to help them with better ways to coordinate social outreach among their employees?

A: Shashi Bellamkonda spearheaded internal training sessions at Network Solutions with a particular focus on Twitter. He educated the customer service team on how to respond and what kind of tone to use. It put a new process into place, and then used monthly sessions for employees to learn and to remain up to speed on social media responses. As of today, the Network Solutions customer service team personalizes its tweets by using initials.

Another new process set into place was the Social Media Advisory Board. It was really important to completely remove the skepticism that surrounded social communications. We realized quickly there was some skepticism; so as the agency (myself and Geoff Livingston, SVP, Social Media, CRT/tanaka at the time), we knew that getting a new process in place would include an Advisory Board, all in an effort to get Net Solutions to further help the small business. No matter how much the agency preached or the internal team made recommendations, it was the advisory team that brought the credibility to social media and who understood the concerns of small businesses. The Board was made up of 10 social media leaders who gave advice and reinforced to company executives how Network Solutions should engage online. We quickly saw the trust factor go up, and it was amplified. The Board reinforced the use of social media and the importance of honest feedback.

The COMMS Organizer Check List

✓ Realize the accepted top-down approach to messaging is no longer viable when you need to address how people talk about your company; its products and services through social channels.

✓ Evaluate your current internal communication process to then identify a few new procedures, which most likely touch upon and relate to *every* part outlined on the Social Media Strategy Wheel.

- ✓ Create a flatter internal structure in which information is shared unilaterally among various departments because those departments and different levels of management want to engage in social media.
- ✓ Plan the best ways to create cohesive and consistent messaging so that social media does not fragment the brand.
- ✓ Determine which of the five new procedures outlined in this chapter are necessary and can be useful in your company to create more organization and cohesive communications.
- ✓ Set up a Monitor/Listen/Respond strategy to guide your process.

5

New Practice #5: The Pre-Crisis Doctor

When calamity strikes at a company, reputation and crisis management become a priority. The executives immediately call in the PR team to identify and neutralize the situation by creating an appropriate response to the public outcry. Why is the PR team called upon after the crisis occurs? As a communications professional, you should be thinking proactively about the possible levels of crisis escalation long before an issue arises. In social media, the conversations are in the public view and through technology are easy to find and address. That's the good news. Unfortunately, the public's mainstream use of social media can become rapid-fire, turning the slightly negative molehill of a situation into a full-blown mountain of catastrophe for your company. You need to be well informed and have intelligence at your fingertips. You and your peers must also be trained in social crisis management. Preparing and handling crisis through newer communications channels is different than situations in years past. Your strategy and planning for a crisis starts long before the incident actually occurs.

Think of any of the casebook crises including BP, Domino Pizza, Kenneth Cole, Nestlé, and United Airlines, to name a few. Do you think these brands had a team of professionals proactively monitoring their social media channels, ready to handle different levels of crisis escalation? Wouldn't it benefit a company to take a proactive approach to crises, knowing immediately how to handle an urgent situation through any particular channel, especially now that the channels include social media? It would be even better if PR professionals along with customer service were documenting instances of how to handle certain circumstances; everything from the proper response and statements needed, from the bottom right up the chain of command. The company should be categorizing different issues that may occur and identifying, in advance, exactly who would be involved on the inside to evaluate and handle specific issues (brand-related, product-related, or miscommunication). In most cases, when a negative situation arises, the conversation starts and escalation occurs quickly. Unfortunately, for most companies, negative sentiment at a full-blown crisis level, and the public dissatisfaction that results, is editorialized through all media channels.[1]

The Pre-Crisis Doctor, your new PR practice #5, was born out of the need to proactively monitor social media conversations and track the sentiment of customers and other stakeholders when conversations are under "control." At the same time, the need for new media handling must also be integrated into a company's overall crisis plan. On your Social Media Strategy Wheel, planning for social media crisis touches on your monitoring, channel distribution, content/communication, and measurement planning (see Figure 5.1). The PR team who takes on the role of the Pre-Crisis Doctors realizes the crisis strategy for social media is:

- One part monitoring and having the right tools in place.
- One part prepared communication response and knowing the appropriate company personnel who participate.
- One part measurement, as a company moves through the evaluation of a negative situation, benchmarking whether their communication was effective.

Today you've seen through case studies of crises the results of a lack of response when customers have a problem or stakeholders take issue with your company. Today's brands are in the public's critical eye with their products and customer service as the topic of constant conversations. Communication travels more quickly than ever before through social media channels. As a result, the PR professionals who used to take the role of crisis manager must now expand their knowledge and skills to meet the requirements of a new practice, the Pre-Crisis Doctor.

What Are the Responsibilities of the Pre-Crisis Doctor?

The difference between the PR crisis manager and the Pre-Crisis Doctor is the ability to listen long before a crisis escalates. The Pre-Crisis Doctor also has a strategy for different channels that may cause the crisis, understands

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1 Jarboe, Greg, "Online Reputation Management Case Studies," *Search Engine Watch*, January 13, 2010.

how different areas of the company and employees in those areas will respond, and knows how to evaluate and avert the situation from either starting in the first place, or at least from spiraling out of control. It's one thing to prepare how you would manage the situation, but it's an entirely different strategic process to try to prevent it from gaining momentum. An ideal scenario would always be to stop the crisis from even occurring. But, you know this isn't realistic. Therefore, you use your preparedness and quick response to slow down the momentum to avoid reputation damage. Why? Because today you can monitor, evaluate, and respond more proactively to all different types of media, including the negative conversations in social media communities. There should be no waiting or hesitation. If two hours of crisis go by, then those two hours have the potential to lead to serious reputation issues and damage.

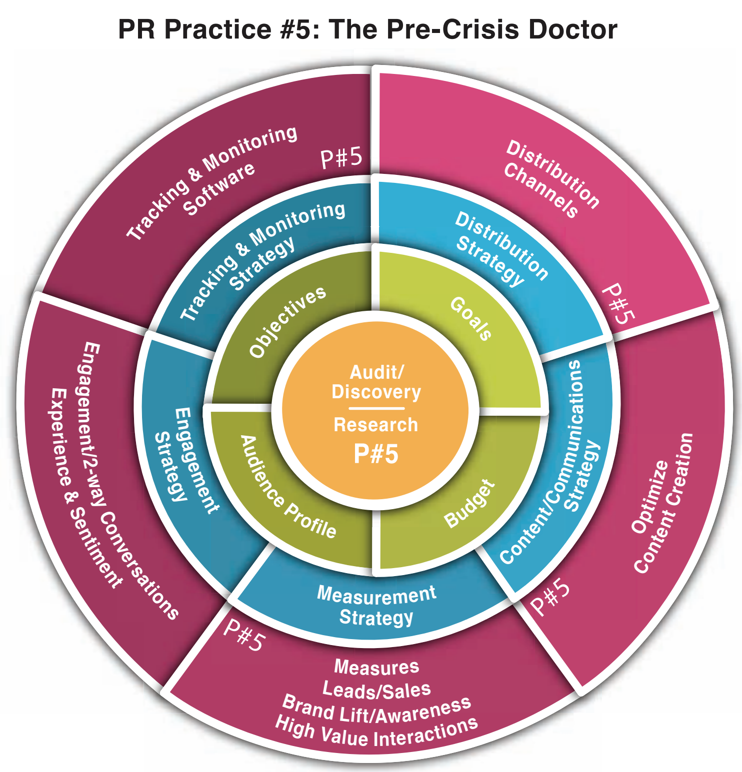

Figure 5.1 The Social Media Strategy Wheel: PR Practice #5

How do you become a Pre-Crisis Doctor? Part of the process is learning to monitor more closely and on a constant basis. Social media doesn't stop at the close of the normal business day and doesn't take off on holidays. People are talking into the late hours of the night and early hours in the morning. Years ago, the crisis manager would have a plan in place that covered what would happen if negative communication appeared in traditional media. Then, at the onset of web communications, businesses found the benefits of 24/7 interactions and a broader reach, but this also meant information about their issues could spread faster through online media, when a negative story broke.

Now, the media doesn't have to break the story because consumers can easily share their news, negative views, or opinions in their communities, followed by the media reinforcing the escalating issues. A perfect example was the fate of the US Airways flight, which landed unexpectedly in the Hudson River in New York. Twitter broke the news before the network news vans arrived. With ongoing monitoring in place, the Pre-Crisis Doctor has a better chance to pinpoint a mounting issue, evaluating it more quickly, focusing on the change in sentiment, and carefully responding to slow down the rapid pace of sharing before the issues gets completely out of hand.[2]

Going beyond the crisis manager, most Pre-Crisis Doctors prepare several additional resources integrated into their crisis planning. These resources include the following:

- A Social Media Crisis Organizational (Org) Chart
- Comment Response Chart (Action = Reaction = Action)
- The Shell of the Message
- Your Target Media (Old and New)
- An Identify, Evaluate, and Train (IET) Process for Social Crisis Measurement

A "Crisis" Org Chart

When you begin working at an organization or you're the agency working with a new client, one of the first resources you review is the organizational chart. A good chart lays out the structure of the organization and allows you to see levels of communications accountability. The Pre-Crisis

[2] Deards, Helena, "Twitter First Off the Mark With Hudson Plane Crash Coverage," Editor's Weblog.org, January 19, 2009.

Doctor knows the same type of chart must be constructed for crises. It's called the *Social Media Crisis Org Chart* (Crisis Org Chart) and identifies who is involved in social media crises at any given time. Some companies integrate the Crisis Org Chart into their *Comment Response Chart* (to be discussed shortly in the section on Comment Response Chart) or create a completely separate resource. The most common Crisis Org Charts start with a bottom layer of communications activity, or for the purposes of this discussion, you can call it the lowest level of escalation. Any comment or situation will determine the level of escalation, especially as it becomes negative in nature.

Following are potential levels of escalation and how you might consider aligning specific members of your company:

- **Layer 1 or Level of Escalation 1: No Threat**
  Members of Customer Service Representatives (CS Representatives), Public Relations and Marketing (members of the Account Team), and the general employee population may respond and even share the information.

- **Layer 2 or Level of Escalation 2: Pending Situation**
  Customer Service Representatives (although Customer Service Managers may be alerted), Public Relations and Marketing account team members (although PR and Marketing managers also monitor conversations), Sales, IT, and other key technical or product specific experts may be required to answer specific inquiries.

- **Layer 3 or Level of Escalation 3: Negative Situation**
  Customer Service Managers (Directors or Executives may be alerted), Public Relations and Marketing Managers (Directors or VPs may be alerted), Sales, IT, and CS Representatives and specific key technical may be required to answer specific inquiries.

- **Layer 4 or Level of Escalation 4: Pending Crisis**
  Customer Service Management Team and Public Relations and Marketing Management are all abreast of the situation (Senior Executives and CEO alerted). The designated spokesperson, skilled to handle crisis communications, or member of leadership team may be called upon to respond.

- **Level 5 or Level of Escalation 5: Crisis**
  Senior Leadership or CEO responds to the crisis (Cabinet and/or Board members alerted); all members of the company understand

the nature of the situation and are careful to direct inquiries to the Public Relations department or a Public Information Officer (who works closely with a Chief Reputation Officer and the CEO).

An organizational chart of key contacts involved in the social media responses is necessary, especially as the crisis reaches different levels of intensity. The preceding example could work for a number of companies but is certainly not specific to every company, in every different industry. Whether your Crisis Org Chart looks similar to this example, or you figure out your own levels of escalation, charting those levels with the appropriate parties accountable for responding leaves little room for questions or hesitation. You don't have time to hesitate when it comes to the crisis response process, which should move swiftly and seamlessly through your company prompting the proper messages via the appropriate channels.

In the preceding example, the Pre-Crisis Doctor realizes crisis communications does not only involve the PR and communications team, but social media also requires you to think about the different members of your company and the departments that need to be involved. Your levels of escalation and those who participate will vary depending on how you generally handle crisis in your organization, along with a new emphasis on who steps in to address the situation through social media channels and when. You shouldn't wait until Level 4 or 5 crisis to figure out who's involved with the appropriate social media response. You definitely want to know beforehand the proper handling of comments, concerns, and public outcry through any of the social media channels.

Comment Response Chart (Action = Reaction = Action)

It's better to prevent the situation or manage it by lessening the severity with a response immediately addressing the issue at hand. Companies are learning to listen more closely to the dialog of their customers, the media, bloggers, and so on, whether it's positive praise, product questions, service issues, organizational concerns, or outright anger. As the Pre-Crisis Doctor analyzes how the organization moves through different situations, the conversations are documented and separated into "conversation buckets." These are the buckets that house information or intelligence on best practices.

The conversations buckets become the infrastructure of your comment response chart, which walks (or makes the company run) through a number of different scenarios, whether it's with customers or other stakeholders. Each action (comment) through the chart has a "Yes" or "No" response, which then enables the company to identify its reaction or determine the manner in which a situation needs to be handled. A comment response chart is different for every company because it's customized or prepared to include different types of actions, evaluation, and thoughtful responses. Of course, as you move through a comment response chart, an action causes a reaction, which then in turn causes a new action on the part of the team handling the comments (Action = Reaction = Action). It's imperative to have a system in place to keep actions and reactions positive and moving toward a resolution at all times (in the case of a negative situation). In some cases, the intelligence you gather leads to a favorable outcome and in other cases to some serious lessons learned.

The most famous example of a comment response chart, on which many companies base their evaluation and response, is the Air Force Response Chart, updated January 2008.[3] This chart sets a standard for comment, evaluation, and response, also taking into consideration transparency, tone, sourcing, timeliness, and influence. Many companies base their response system on this chart. Of course, you must do your homework and identify types of comments and possible situations specific to your company and industry, as well as how to work with other departments in your company to document actual situations and their handling in the past. This exercise creates response buckets or intelligence available to the PR and communications team, or any other member of the crisis team who needs information quickly on a particular scenario.

Although every company is different, a few of the common conversation buckets may break down in the following way:

- Positive praise
- General company questions
- Information on marketing or promotions required
- Specific product-related questions
- General community questions
- Frequent types of miscommunication
- Bad experiences
- Spam messages

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[3] Devilla, Joey, "The Air Force's Rules of Engagement for Blogging (Updated)," *Global Nerdy*, December 30, 2008.

- Self-promotional messages
- Angry Rager's Rant, with or without cause
- Deterrent Detractor's hate, without cause

After you have your comments/situations into buckets, you can then decide the three major ways your company responds: 1) all employees can answer, 2) specific departments answer targeted questions, or 3) PR/communications and specific departments answer negative or inappropriate comments.

It's important to show how comments are routed in different ways so that appropriate parties can answer everything from the positive company praise, down to handling the hate of a Deterrent Detractor. The public "all employees can answer" is certainly the simplest of the comment response routes. This part of your system is focused on the positive praise and comments reshared with other community members. The second area is specific to questions related to customers, whether it's a specific product-related question for customer service or a PR and/or marketing question relating to a specific promotion or campaign. Or it could also be a comment/question that's geared for another member of your community; in this case, a company representative should not reply. The third area is the negative and inappropriate comments, which of course needs careful handling. These comments may be managed by the communications team (with the help of other subject matter experts), up the chain of command to more senior team members, who may be required to address the public through various social media channels.

Of course, understanding the individual(s) behind the negative action can also determine the type of reaction required. There's a huge difference between how you would handle a current customer's upset, versus the angry person on a rant (the angry "rager") versus a deterrent detractor who hates the company and will not change his opinion (who you simply monitor, but don't respond to). You also need to focus on the influence of the person or the people who are causing the disruption. Remember, someone can be an influencer with a large number of friends and followers, or a person may be influential, in which case their network is smaller, yet they most certainly can sway others to think negatively. Although everyone is important, priority timing and action may be tied directly to influence and the relationship the brand has with the person or people at the heart of the escalating situation.

The Shell of the Message

With social media, you may face the small conversation mishap on Facebook or Twitter to the full-blown "tornado" crisis in the form of a YouTube video. The perfect scenario would be that many of these situations are already properly documented and placed into your Conversation Buckets identified earlier. You should also have an internal sharing system in place for all members of the crisis team to easily access the documented information during the crisis situation. Anticipate what could happen and go on the offense.

In April 2010, not only did traditional media keep the BP oil spill catastrophe alive, so did social media. Of course, BP should have responded in a more timely fashion, and the company was criticized for inappropriate comments. It was also clear they did not anticipate other details that became public (and consumer-generated) as the story unfolded. As a Pre-Crisis Doctor, you must dig deeper for those "smoking guns" and make sure you have the information and a proper response (as a part of the shell of your message) before someone makes it public knowledge and catches you off guard. Of course, whether you bring it out into the open or it's called to your attention, you must recognize the situation, acknowledge to the public what occurred (factually), and apologize again and again, if necessary. The apology will hopefully make it easier for the organization to move forward.[4]

Of course, every situation is different, and it's almost impossible to prepare detailed responses in advance. However, you must think about situations that may occur and what is your company's policy with respect to those situations. This information forms the shell of your message. For example, a well-known situation prompted @ComcastCares on Twitter, when a service repairman fell asleep on the customer's couch and the situation. What about the Dominos' franchise employees defacing the pizza and the Dominos Brand? In both instances, you most likely have an immediate response: Our company does not find this acceptable, and these types of actions will not be tolerated. Another example is a customer complaint about your product or service. You may not know the exact situation, but you can certainly let the customer know that you are sorry for their frustration and you are researching the details quickly. You would offer a response with a reasonable timeframe to get back to your customer.

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[4] Huffpost Green, "BP Smoking Gun: Oil Giant Skipped Critical Testing Hours Before Explosion," May 20, 2010.

You may also identify specific situations in which you immediately ask a customer or another stakeholder to reach out to you directly or to customer service directly, placing them in touch with someone who can help them quickly. This is also a part of the shell of your message when a negative situation surfaces. There are hundreds of scenarios that occur in each of the Conversation Buckets. Knowing the type of situation helps to frame out your mode of response, so you can weather the situation and get it back on the right track. In some cases, just a response acknowledging what happened with a sincere apology can put the upset or angry person at ease.

Your Target Media (Old and New)

Before an issue escalates, you must identify and prioritize those influencers who you will alert at the onset of a crisis. Crisis managers were skilled at pinpointing the priority media, and today we include bloggers as powerful influencers during a crisis situation. One key reason to build strong relationships with the media is when a crisis strikes, you have an outlet to tell your company's side of the story. As you build relationships with journalists, they turn to you for information and commentary. If you have been a good resource and journalists can rely on you for quick, accurate information, then they will not hesitate to reach out to you when a situation escalates. Here's where the relationship building skills pay off.

It's a similar situation with bloggers. They, too, have a tremendous amount of clout for reporting information to a community of peers. A blogger, similar to a journalist, can post a story that will be shared and talked about with authority. The blogger is the trusted peer, and his perspective carries a great deal of weight. As a part of your social media crisis plan, you must know the bloggers you can rely on to quickly update their networks with your perspective. Don't wait until a crisis strikes to try to share your news. Rather, you need to identify these influencers first and start the relationship-building process. They, too, require you to understand their interests, what they report on to their communities, and the best way to approach them with a pitch.

There is sophisticated software and tools to help you identify these bloggers and influencers in your network who have an effect on the behavior of your stakeholders. You can pinpoint these influencers based on the size of their networks right down to their amplification, generosity, and the clout they carry. Several of the free tools available also enable you to see how influential bloggers are in your industry, including Klout, Peer Index, Alltop, Ad Age Power150, and Twitalzyer. You will want to select the top, influential bloggers who have the greatest reach to help in time of a crisis. If you can quickly share your updates with influencers who will share with their communities, then you can reach an audience of audiences. Although social media starts as a one-to-one communication approach, your relationships can transform the one-to-one to one-to-many and then finally, many-to-many. Today, you need to have all types of media as advocates to help get out immediate information to the public and to share the messages that are critical to your company's position or perspective.

Identify, Evaluate, Test (IET) for Social Crisis Measurement

You need to pinpoint the tools, resources, and platforms that help you track rapid communication during a crisis. Identify, evaluate, and test (IET) all your technology so that you can easily and quickly use it during a crisis situation. This type of homework should be done beforehand. Evaluating your social media monitoring tools for crisis is an exercise to determine your resources early, including your budget to license a software program and how many people will listen, evaluate, and respond to the comments, tweets, and updates. You also need to know which specific individuals incite the situation, as well as those who can help to calm and minimize the escalation. Your monitoring platform enables you to follow both closely. Make sure you and your communications team select your platform and test or trial it, so you're familiar with gathering the information, selecting the right charts, and reporting methods, and you can generate appropriate reports for your executives who watch the situation closely. You don't want to wonder how to track conversations, determine which charts to use, or figure out how to retrieve the best reports at the height of your crisis situation.

When you have a system in place and you have tested and worked out all the bugs, you are prepared to handle the unexpected. As a Pre-Crisis Doctor, you must set up potential negative or crisis keywords so that you can watch closely how people refer to the brand to catch any negative activity before it escalates. You should work into your daily routine watching for words that could be potentially damaging to your brand and be ready to investigate if you come across any that may be harmful to your company's reputation. Today, simply checking your Twitter feed and Facebook page is not enough. If people have a negative experience with your brand, they may not necessarily say it on your Facebook wall or say it directly to the company via your official Twitter handle (although many use Twitter as a sounding board when they are upset with their brands). In some cases, they may go to a customer complaint site or a customer network and post exactly how they feel, paying attention to the unflattering details. If you don't have your monitoring turned on, you won't know the negative sentiment exists.

What Are the Best Practices of the Pre-Crisis Doctor?

Sarah Evans is a PR and social media consultant and the founder of Sevan's Strategy. She was named in *Vanity Fair*'s "America's Tweethearts," *Forbes*' "14 Power Women to Follow on Twitter," and *Entrepreneur*'s "Top 10 Hot Startups of 2010." In a Q&A, Sarah offered her thoughts on the best practices of the Pre-Crisis Doctor.

Q: How do you create a crisis communications plan for social media, particularly with an accelerated time plan (instead of the traditional news cycle), and how do you respond in real time—the first 15 minutes, few hours, and so on.

A: In the past when responding to crisis, you typically had 24 hours to channel your response to the appropriate media outlets to keep up with the traditional news cycle.

With social media hyper-accelerating news sharing, in reality, it takes only one well-placed tweet or social post for news to travel and for the fire to spread. For communications practitioners, this means strategizing in real time and having a crisis communications plan in place that stems from what to do within the first 15 minutes of crisis.

To respond quickly, it's imperative to prepare in advance: Have approved key messages in place and ready to go at a moment's notice, assign key roles for who's in charge of specific response actions, and create an *actionable timeline*, as follows.

Social and Traditional Communications Channels and Pre-Crafted Messages

Start by creating a list of your brand's communication channels, from Facebook, Twitter, and other social platforms to the employee intranet, internal emails, and other traditional and social outreach methods. From here, pre-craft messaging for each channel. Hint: This isn't just drafting talking points for your CEO, social messaging includes example tweets, Facebook posts, and information for your company blog, among other social assets.

A few other questions to consider and ask in advance: Does the crisis team have access to mobile channels? What types of crises are specific to your organization? What messages are appropriate to certain situations (for example, a natural disaster versus an employee issue)?

Key Roles: Channel Managers, Your Crisis Team, Brand Champions, and Employees

Channel Managers: Determine who disseminates your message for each channel, making sure to specify who is in charge of monitoring, responding, and sending out the message, so there's no confusion. As an extra precaution, assemble a back up team for each position; you may have two to four people in place.

Your Crisis Team: To help news organizations find your sources when researching a crisis incident, identify the key individuals who make up your crisis response team, develop online bios highlighting these individuals, and include this in an up-to-date online news kit for easy media access.

Brand Champions: In addition to your internal channel managers and your crisis team, collaborate with the organization's brand champions or ambassadors involved in your social planning. These individuals are critical for outreach, particularly during negative trending periods. Today, the traditional spokesperson is less trusted than the peer ambassador, who typically is not compensated, but has the credibility factor to help your brand.

Employees: Identifying voice and who's going to speak, including the general employee population, is a key part of your preparedness. Remember, employees will go to their Facebook pages, and people will ask them questions. It's the communications professional's responsibility to implement an employee social media policy so that employees are aware of the regulations, have received training, and know what's acceptable and unacceptable to share, and how to respond or to flag the post for a crisis team manager.

Public relations professionals must strategize internal communications to prepare and train company employees for crises on both the traditional, and social fronts. Your internal network of employees is the company's first line of offense and an essential part of neutralizing the situation.

Social-Infused Timeline

Hours One and Two: The timeframe for social media crisis is immediate, with a focus on stakeholder and official statements in hours one and two. Although you have approved messages in place, you also must develop appropriate messages based on the situation.

During this time, you set up keyword alerts and keep a pulse of the particular crisis.

Hours Two and Three: In hours two and three, you send out statements via traditional and social media outlets, or this can be done earlier via a release. Make sure that savvy and powerful messages match the medium.

At this point, you also respond to online comments, noting how soon you will respond and what you will and will not respond to in certain instances.

Hours Three Through Eight: In hours three through eight, your team continues to monitor and execute your crisis communications plan, with hour five as a benchmark to pull together and/or to redirect your efforts. Although redirection can always occur earlier, you should be ready to change tactics, remain flexible, and switch your approach around hour marker five, if needed.

Q: How do you prepare for a crisis with so many different departments using social media? What type of coordination do you see between PR, marketing, and customer service and the general employee population?

A: Ideally, you want to have your departments collaborating during a crisis. Realistically, prepare for turf wars.

Prior to a crisis, know where employees from these different departments are online. Create the tools and resources for them, and divide up the segments of employees who have been identified and trained in advance and can handle certain responsibilities during a crisis. For example, there are human resources messages, business development messages, public relations messages, and brand/product messages, which vary by crisis.

To better illustrate having the right people in place with the right messages, I used to work with a trauma center. If there were an accident and the news media were reporting outside of the trauma center, we knew they wanted to hear from the spokesperson in scrubs (the attending physician). If there were no doctors available to speak, then a nurse served as our next line. We always coordinated in advance to accommodate the news media, and the same holds true with social media.

Q: What are some best practice tips and tools, and how do you monitor the conversation for a potential crisis?

A: As a best practice, develop a Social Crisis Response Matrix. This table organizes your available communications tools in the top column and the types of crisis and messages necessary for each. For example, if a crisis occurs through social media/video, then a video message through the same channel serves as an appropriate response. Messages vary depending on the medium used, from the email and your internal communications to Facebook and Twitter for external responses, and as mentioned earlier, need to be approved beforehand. In addition, everyone should have a checklist of all the communications resources available.

When monitoring the crisis, you may use Viral Heat, Alterian, Lithium, or Radian6, but in addition to paid tools, you can stock up your monitoring arsenal with free tools—for example, SocialMention, Topsy, and Google Alerts.

Monitoring the conversation for crisis depends on the hour. For example, in hours one and two, you need to watch sentiment closely. To demonstrate this, there have been situations with the Red Cross in which mobile alerts revealed that in hours one and two, the sentiment was 100% negative. Through monitoring, it became evident when the situation was neutralized and sentiment changed to 100% neutral.

Of course, in the case of the Red Cross and a recent rogue tweet (a personal tweet accidentally sent from a Red Cross social media account by an employee), the Red Cross neutralized what could have potentially become a negative situation by being proactive and not making a big deal. The sentiment remained neutral by a proper response, and the Red Cross moved onto more pressing matters. To prevent situations of this nature, make sure boundaries are set in place for your employees, and counsel them on social media best practices, including keeping work and personal accounts separate.

You can't protect the organization if it's the CEO who lacks discretion, as was the case of Kenneth Cole and his use of the #Cairo hashtag. (His tweet made light of the Egyptian uprising to promote his new line.)

In most cases, traditional and social media work the same way. You need to kill the story before it gets too far while keeping a constant pulse on your brand's online monitoring. When the online conversation starts, it should not continue without you (because it will if you're not paying attention) and could evolve into something bigger. If you prepare for the crisis, the situation becomes a nonissue, and the result becomes a nonstory.

The Pre-Crisis Doctor Check List

- ✓ Know the difference between the PR crisis manager and the Pre-Crisis Doctor, who has the ability to listen long before a crisis escalates.
- ✓ Learn to monitor more closely and on a constant basis because social media doesn't stop at the close of the normal business day, and it doesn't take off on holidays.
- ✓ Create the Crisis Org Chart, which identifies who is involved in a social media crisis at the different levels of crisis escalation.
- ✓ Analyze how the organization moves through various situations, and document these conversations into separate "conversation buckets."
- ✓ Build a Comment Response chart that identifies actions (comments) through the chart that require a "Yes" or "No" response. Through the chart, the company can identify its reaction or determine the manner in which a situation needs to be addressed.
- ✓ Have an internal sharing system in place for all members of the crisis team to easily access the documented company crisis information.
- ✓ Dig deeper to spot those "smoking guns," and make sure you have the information and a proper response (as a part of the shell of your messaging) before your company and executive team are caught off guard.
- ✓ Pinpoint the priority media before the unexpected occurs, including bloggers as powerful influencers.
- ✓ Use sophisticated software and tools to help you identify the bloggers and influencers in your company's network who have an effect on the behavior of your stakeholders.
- ✓ Make sure the communications team has selected a monitoring platform in advance.
- ✓ Test or trial the monitoring platform so that you're familiar with gathering the information and selecting the charts and the range of reporting methods.
- ✓ Train your team, or any other departments involved in the crisis communications, long before a situation can escalate out of control.

6

New Practice #6: The Relationship Analyzer

In college, you learn how PR builds relationships with a company's stakeholders to foster goodwill and to raise public confidence. Nurturing and leveraging relationships is a practice at the heart of the PR profession. When you graduate from school and you're out in the business world, your skills are tested in a variety of situations—from the relationships you build within your own company to every audience segment connected to your organization. One of the most frequently talked about, and often tested, relationships is the PR person's bond with the media. However, today's media encompasses more than simply journalists. You must consider bloggers, which come in varying levels of influence, and your customers, who can also publish their own media.

As much as the media world has changed, increasing in size and scope, you have an incredible advantage to strategically organize your social media communications (remember Practice #4, the COMMs Organizer) and to use Web 2.0 technology (putting Practice #3, the PR Tech Tester, to use) to learn more about the people you want to reach and engage. However, connecting and building the relationship is only half of your job. The other major opportunity, and the second half of your focus, should be to dig deeper by analyzing relationships and to make them stronger for the long term. You have the mindset, skills, and technology, which allow you to observe the sociology of social media, or to study the behavior of the community members and the affects on the relationship.

You're ready to discover what's behind the interactions of your audience, one by one and more so than you could ever uncover in years past. Having access to the Internet gave you the ability to search and find massive amounts of information on journalists. At times, there was so much information available, journalists have confessed to feeling stalked by PR professionals who had too much knowledge about them.[1] However, today, technology gives you the ability to examine not only individual behavior but also group behavior. You can pull meaningful sharing statistics and, in turn, create an environment of connections that suits the needs of your constituents.

When you move from relationship building to relationship examining, a new practice for public relations surfaces. It's Practice #6, the Relationship Analyzer. **The Relationship Analyzer** is a strategic practice that digs into the psychographics of people based on like-mindedness and common critical issues, and the study of behavioral actions between people in your communities, as a key to higher-level interactions. Relationship analyzing is represented on your Social Media Strategy Wheel during the research and audience profiling phases, and when planning your monitoring, communications, and engagement strategies (see Figure 6.1).

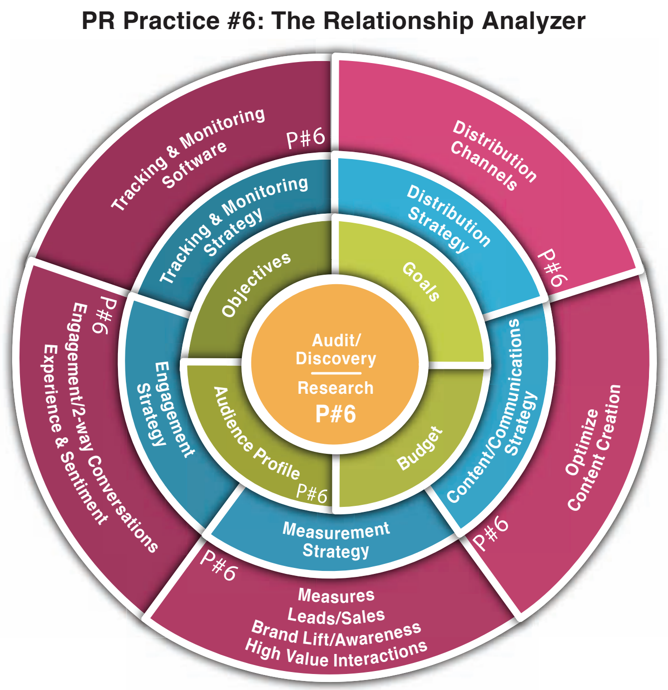

Figure 6.1 The Social Media Strategy Wheel: PR Practice #6

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1 Breakenridge, Deirdre and DeLoughry, Thomas, *The New PR Toolkit: Strategies for Successful Media Relations*, Pearson Education, Inc., 2003.

You're about to embark on a three-part Relationship Analyzer process. From this point onward, you can capitalize on your relationships and take none of them for granted.

What Are the Responsibilities of the Relationship Analyzer?

The three-part Relationship Analyzer process guides your approach to connections and deepening relationships. This three-part process includes the following:

- Part I: Development of the Audience Profile
- Part II: Technology to Analyze Direction/Growth
- Part III: Strategy to Build Relationships Based on Community Culture

Each phase of the process lets you apply knowledge you already have, and you also can employ new technology skills to move the relationship "needle" toward advocacy.

Part I: Development of the Audience Profile

Relationship analyzing is a new practice, which calls for a closer view of the critical issues of the people you want to reach in their web communities. This requires a good look at your audience segments and developing profiles to detail their participation. You also need to identify what topics of interest drive the influencers in those communities and how focusing on the critical issues work to your benefit.

Relationship Analyzers must know the best way for their organization to reach out and, in turn, affect many groups of people in the social media landscape. You communicate in a number of different ways to connect and interest different audiences, including customers, prospects, influencers/bloggers (from A-List bloggers to Trendsetters and other public relations influencers), partners, and journalists through your social channels. At the same time, as a PR Policymaker and Internal Collaboration Generator, you begin to work more closely with your own colleagues on their communications to help champion social media interactions internally, as well as your own.

An *Audience Profile* is a helpful resource to identify the needs of each audience segment to pinpoint exactly where groups are congregating, to distinguish what issues/topics interest them, and to allow you to discover the best ways to communicate directly. By identifying specific needs and interests, you can provide helpful and meaningful information to build stronger, more mutually beneficial relationships. Audience profile development helps you to engage more as a "peer" and to be seen as a helpful and valued resource, rather than a communications professional from an agency, corporate entity, government agency, or nonprofit association looking to increase awareness, leads, sales, or donations. Social media is about people, and your company's social media must reflect the humans behind the business.

The Audience Profile consists of answering the following questions:

- What are the benefits and opportunities of interacting with a particular group? What exactly do you want from this group? Are you looking for a specific type of engagement, whether it's learning about your industry thought leadership, or you would like to have some type of mutual reciprocation?
- Where does this group congregate? Do the group members spend more time on Facebook and Twitter, or are they in niche networks, such as LinkedIn or a Ning social network? Tools, such as Quantcast, are great to see how different groups participate on specific in social network.
- What are the key issues/concerns/needs of the group? What motivates this group to share, discuss or converse, debate, laugh, show emotion, and so on? By monitoring and tracking keywords in a platform, you can uncover the hot or trending topics of interest.
- Who are the key influencers in the group? Who drives these issues, and who are the most vocal on a topic of interest? What is their level of influence? Tools including Klout, Twitalyzer, and PeerIndex can provide the extent of an individual's influence.
- How does this group like to participate, and what do they expect from you? Where do these people fall on the participation scale? For example, Forrester's Technographics Ladder is a consumer tool that uses demographics to reveal how people participate from Inactives and Spectators of social media, all the way up the ladder to Conversationalists and Creators of content.

The answers to these questions enable you to create your Audience Profile. Now, you have a reason to connect and deepen the relationship the right way, and to also reach the type of engagement you set out to achieve. Remember, many of the people who participate with you in social media communities will be some of the people you already know through other traditional or digital channels. However, unlike any other type of communication, your participation is based on understanding what interactions mean for relationship growth. You must rely on technology to help you to visualize the relationship and foster growth from casual awareness to loyal advocacy.

Part II: Technology to Analyze Direction/Growth

Of course, the next part of the Relationship Analyzer's job is a direct response to the depth of relationships and the participation required to keep close connections. The Relationship Analyzer uses technology tools and resources to monitor the direction, growth, and strength of the relationship, during all phases of communication. Technology reveals the weak connections between you and a friend/follower, or between your brand and its stakeholders, so that you can apply new strategies to strengthen those bonds. You can also learn to capitalize on the solid relationships by further leveraging your social champions, which leads to measurable outcomes for your organization, including endorsements, advocacy, registration, leads, and sales.

As you participate in social communities, you quickly learn your friendships fall into different buckets. (These buckets may change depending on the community.) However, you can group friends/followers into the following classifications: Casual Friend, Taker with Good Info, The Giver, The Giver and Taker Friendship, and then the Trusted Confidant/Brand Champion. Each level of relationship building in a community has the potential to move up a level and provide more value from your participation and direct engagement.

You can imagine these buckets as a *Relationship Stairway*. With each step you climb on the staircase, the relationship moves closer to advocacy. At the top of the stairs, you are rewarded with an experience or the ultimate engagement, whatever that means to you either personally or professionally. These are your social media engagement goals.

Following are definitions of the steps and the behavior you and your company experience as you climb the staircase:

- **The Casual Friend** may be the friend who gives you a quick "Good Morning" with a smiley face or a brief comment about the day. Don't underestimate this friend; you have the opportunity to turn the brief encounter into sharing content and engaging in a deeper discussion.

- **The Taker with Good Info** is the friend who begins to share information with you, with the hope that you will discuss what she's shared further in your communities. Because the information is meaningful, you willingly share but realize you have to move to a more reciprocal relationship.
- **The Giver** is the opposite of The Taker and is a special friend (whether you know this individual personally or professionally) who doesn't ask anything of you; he/she simply finds you interesting and naturally wants to share your information with their friends. When you reciprocate, you move to a more meaningful relationship for both parties.
- **The Giver and Taker Friendship** is a level of friendship where the relationship becomes equally balanced, and both sides feel a great deal of benefit. You have the potential to move toward trusted confidante where the relationship goes far beyond social media.
- **The Trusted Confidante and/or the Brand Champion** is at the top of the Relationship Stairway and is someone who you will trust to further your initiative or cause, and whom you know will handle your brand with the utmost respect and praise. Suddenly your friendship has moved from virtual to physical.

Moving up the Relationship Stairway requires you to use technology to visualize your relationship. Resources and monitoring analytics can help. Now focus on some of the tools and monitoring related to platforms. One example of a technology tool/resource to help visualize your Twitter relationships is a MentionMapp. The MentionMapp illustrates a Twitter graph of connections with deep orange lines to reveal strong conversational relationships with peers and light gray lines to show connections that are not deep by nature. By seeing visually the deep orange connections, you can investigate the follower/type of influencer to see what it is that makes this person engaged, what content has been shared with this person, and why the relationship is represented as a deep connection. You can also see their connections to other people in your network. Use of MentionMapp will also reveal your competitors' connections as well as the strengths and weaknesses of their relationships.

You can certainly capitalize on the great connections by feeding the influencer with more of what they like and need. At the same time, the MentionMapp enables you to figure out a better strategy with certain gray connections that illustrate you are not cultivating a relationship as quickly as you would like. The technology enables you to see where your connections are the strongest and where you need help with your engagement to move from awareness and the casual friend (gray) to a confidant or loyal brand advocate (orange).

When you visualize your Relationship Stairway, you can ask:

- How do you think your friends/followers view you or your brand on the Relationship Stairway, and how do you view them?
- Have you taken the initiative to climb the steps a little higher with some or most of your friends/followers?
- How do you figure out which friends/followers you want to move up the steps quickly, and have you analyzed these friends lately?

Other tools to analyze relationships in social communities include TweetStats, TweetReach, WhoTweetedMe, The Archivist, Twenty Feet, Twiangulate, Facebook Insights, and Touch Graph, which allows you to not only see your close Facebook connections, but also visualize connections between related websites.

Part III: Strategy to Build Relationships Based on Community Culture

The last part of the Relationship Analyzer's job is to understand the culture of different communities and to apply the cultural norms and group behavior to rally the community on your behalf. You need to investigate your own participation to know how to engage differently in networks. For example, communications professionals realize Twitter is frequently used for questions about customer service or product issues. Although Facebook is also used for customer service, it offers consumers unique promotions and sweepstakes for lead generation, as well as opportunities to ask questions for research or product innovations. Your job is to know how culture and best practice engagement play a part of relationship growth.

The more you work with your company to create engagement opportunities on the different social media platforms, the more you see some common threads, where information is shared in both places. However, as you become familiar with the platforms, you can also see there is a divide between network activities. For example, how you share on

Twitter may differ significantly from the activities on Facebook. Of course, Google+ is also a part of the mix with companies learning to build their brand pages and determining what to offer in this network.

Brands should make each community experience different to accommodate the needs of the members, to respect and conform to the community culture, and to implement the best collaboration practices. In some cases, you have different people interacting with you, and in other cases, loyal brand enthusiasts may want to engage with your brand in more than one place. For this reason, there are some simple ways to differentiate and give your consumers a reason to interact with you in various communities. Although hundreds of networks and thousands of platforms exist, now focus on Facebook, Twitter, and Google+.

Following are examples of the different and accepted ways to engage on the well-known and heavily populated networks. Call them Relationship Boosters you can use to actively participate on Facebook, Twitter, and Google+. These Boosters are meant to raise your engagement from the bottom of the staircase to reach the higher steps.

Facebook Relationship Boosters

For Facebook relationships on the lower part of the staircase, you can:

- Share exclusive promotions and information about product discounts for only Facebook fans.
- Engage directly with a community by creating a Facebook group to spark passion and action with your consumers, bloggers, and other constituents.
- Create an engaging environment in which consumers interact with the brand and their peers, from "likes" and comments on wall posts to trivia and contests/sweepstakes.
- Drive traffic from your brand fan page to helpful information on the company's website (leading to content your Facebook fans requested).
- Create unique content you can't find on any other networks.
- Build a community in which consumers can engage with the brand in fun activities through Facebook customized applications.
- Use Facebook as a brand stream to maximize the brand's presence through status updates.

- Address customer service questions and allow customers to chat with customer service representatives or company experts.
- Develop a community that encourages feedback for research purposes, listening to the conversations between active community members.

Twitter Relationship Boosters

For Twitter relationships on the lower part of the staircase, you can:

- Share newsworthy information related to your brand that interests the community, keeping community members updated about the brand's activities.
- Link to content that's not only interesting, but also has the potential to go viral. (This may or may not be directly related to your brand.)
- Recognize, thank, and reward customers, bloggers, media, and other stakeholders for sharing your brand information and activities.
- Develop conversations and engage in dialogue around industry topics for thought leadership.
- Engage in conversations to help people by answering questions, addressing concerns, and aiding consumers in the decision-making process.
- Promote your own community members' content including their articles, blog posts, videos, podcasts, and so on, which help to build stronger and mutually beneficial relationships.
- Share special offers and discounts by offering links directly to those promotions on brand landing pages.
- Engage with influencers/bloggers, and build new relationships that lead to increased awareness and coverage/endorsement of your brand.
- Find and follow journalists to stay abreast of what they tweet to better understand their interests for possible editorial coverage.
- Create virtual events/Twitter chat sessions through hashtag discussions.

Google+ Relationship Boosters

Although fairly new to brands, Google+ launched its brand pages for organizations to connect with constituents in different ways and to further take advantage of the power of Google search. Google+ enables businesses to organize audience segments in circles; to differentiate customers, prospects, partners, vendors, bloggers, media, and so on; and to create more targeted communications for each group. Another great interaction tool on Google+ are the video hangouts, which allow company employees to have face-to-face video interactions. Customers can get more intimate interactions with the people behind the corporate logo. Chief Executive Michael Dell tested this principle in Google+ hangouts before the brand pages were launched. By personally experimenting in hangouts, he invited people to join him, which raised the idea of having customers join Google+ hangouts with Dell service and sales teams. Dell saw the distinct possibility to help multiple users with similar issues to find a solution at the same time and in the same Google+ hangout.

Another great example of boosting relationships in Google+ is what Indie music artist, Daria Musk, did to propel her career. Daria arranged 24-hour concerts in a video hangout. She had approximately 9,000 fans join her in a hangout, with more than 100 countries represented.[2] This music artist's career took a turn for the best when she used Google+ as her point of engagement, singing for thousands of fans. With direct interaction, she made the correlation between Google+ hangout activities and her newfound rock star recognition. In Daria's case, there was no mistaking the results of her efforts. She's been booked as a guest speaker/performer at various music and tech conferences, and she's also solidified a worldwide music following, post Google+ concert hangout. Your greatest measure of relationships can be the one-on-one face time you spend with fans in a hang out.

News of Daria's Google+ hangout concerts spread quickly, with the story picked up by CNN, Reuters, and other international outlets. In addition, Daria Musk landed on Business Insider's list of "Interesting People to Circle on Google+" along with Republican Presidential Nominee Newt Gingrich and Actor William Shatner.[3] Again, Google+ is an excellent example of moving the casual connection in a platform to a deeper, more intimate

[2] PR.com Press Releases, Internet Music Sensation Announces Google+ Hangout Concert with YouTube Live Integration and Free, Exclusive "Google Song" Download, Fairfield Connecticut, August 16, 2011.

[3] Seaman, David, "Interesting People to Circle on Google+, Business Insider," www.businessinsider.com, July 19, 2011.

interaction based on the culture of the community and accepted activities, with the Google+ Hangout as the ultimate Relationship Booster

Of course, as you move forward, you can also discover your own best practices to build and analyze your relationships through Google+. Another major benefit of Google+ participation is the power of search and being found. Your audience's ability to "+1" content they like on your page helps brands to raise their rank and to be found through organic search. In addition, Google+ Direct Connect enables people to find businesses on the Google+ page quickly, if they search using the "+" sign before the business name. Google+ is a social network to watch for its sharing culture and unique ways to build and strengthen relationships with the people you want to reach.

You can gauge the success of your relationships based on the activity of your audience in a community. Companies turn their own website properties into social communities, including the online newsroom, where the behavior of their constituents lend a hand to better ways to share and acknowledge how your journalists, bloggers, consumers, and other stakeholders want to gather, organize, and decide what's appropriate to share with their networks. Newsrooms today are growing in importance because they offer PR professionals a glimpse at the stories that interest people, as they navigate to find and download information.

What Are the Best Practices of the Relationship Analyzer?

According to Steve Momorella, owner and founder of TEKGROUP International, "Due to the rapid growth of social media use, it's been difficult for public relations professionals to manage multiple social media environments. Concentrating on the online newsroom as a central starting point creates easy access to all neighborhoods in which the company interacts." In a Q&A with Steve, he offered his insight on how to build better relationships through a company's newsroom.

Q: How has technology changed to allow us to build better relationships with the company's constituents who frequent their newsroom?

A: Since its inception in the 1950s, the Internet has been unyielding in its capability to reduce the overall value of "the middleman." Before the Internet, you had to write a letter, put it in a special envelope, put it in your mailbox, and then wait for the mailman to come, once a day, to pick it up and deliver it to your intended recipient. With email technology, you can type your letter and send it directly to your constituent, thus reducing the time, increasing the efficiency and deliverability, and diminishing the middleman in the process. Libraries? They used to be the gatekeepers for all sorts of books, until technologies from companies like Google, Yahoo!, and Microsoft began to erode the dominance of the library.

In the mid-1990s, the same thing happened with retail and shopping. Sites like Amazon.com and eBay using E-commerce technology have eaten into the revenues of traditional bricks-and-mortar. Are mailmen, libraries, and shopping malls extinct? No, but the damage has been done and it's irreversible. In our world, the industry of Public Relations, Marketing, and Communications, our middleman is the traditional press or the journalist, the magazine editor, the newspaper, the public television station, or the local radio news station. And one of the technologies that empower this is the online newsroom. A centralized headquarters of communications content, available 24x7 and integrated with social media, the online newsroom becomes the vehicle, the voice, and the validity for your organization.

Traditionally, a company relied on media outlets as one of the primary channels to constituents, through media relations/PR. Now, with an online newsroom integrated with social media, communicators can build increasingly sophisticated and useful relationships with a wide range of stakeholders and influencers. Sure, the traditional media is still part of that mix—newspapers, magazines, television, radio combined with bloggers, citizen journalists, and news consumers all are included. But so are employees, investors and analysts, partners, resellers and vendors, and existing and potential customers. All these make up the variety of relationships that can develop from using an online newsroom, using content marketing, leveraging social media, and using digital communications.

First and foremost, if you are looking to build relationships with anyone, journalists included, you need to find out where they are, join their community, get an understanding of what is going on, and then participate/share and become more involved with that community. Using an online newsroom can help you by giving you the means to provide compelling stories about your organization and then making those stories available in a variety of locations—preferably locations where the people you are trying to target are located. If you are trying to provide story ideas for journalists to use, then you need to develop relationships with those journalists on Twitter, Facebook, and LinkedIn. But, I think the real power comes when you use your online newsroom to provide stories and content directly to the constituents—the consumers, the partners and vendors, and the prospects.

Using social media to create and nourish those relationships is also a key component of your strategy.

If I am a travel company, and I can develop a relationship (as informal as it may be) with followers of the Travel Channel Twitter account, I now have an opportunity to tell my organization's story directly to them. At the same time, I can use Twitter, Facebook, and LinkedIn to develop closer relationships with travel bloggers, travel editors, and other traditional press that are on these channels. This is the part that scares a lot of PR professionals because they are not used to developing content and relationships at that level. But if done correctly, by leveraging an online newsroom as a headquarters of your news content, and then integrating that online newsroom with social media, you can achieve success both in creating an avenue for journalists to easily find your content and also a series of relationships with people who are directly interested in your organization or brand.

The Internet changed how quickly and directly we could interact, communicate, and share information. A company's online newsroom provides communicators with a platform to make news content available to not only journalists, but also a whole series of constituents including investors, analysts, employees, partners, customers, and prospects. By creating compelling content aimed at each of these groups, and then leveraging social media channels to foster the relationship, organizations can not only take control of their communications efforts, but also develop direct and lasting relationships with their targeted constituents.

Q: What are the strongest measures or analytics we can track in a newsroom to reveal growing community relationships with a brand?

A: There are so many metrics that you are able to track these days, it is amazing. I remember when I was first building community websites in the early-mid 1990s, and we would have to wait a day for the WebTrends analytics reports to come out to know the previous day's traffic. We'd be able to see what content was the most popular the day before, where people went on the site, what pages did they leave from, and so on. Then a program called LiveStats became available in the early 2000s and it was amazing. You could see how many people were on the site in real time, and more important see what content they were looking at, which pages were the most popular. I remember frequently scrambling to help create new content similar to the pages that were being accessed the most frequently. It was pretty amazing back then and set the stage for today's available measures and analytics to be sure. Today, with something as simple as a bit.ly link, I can track in real time how many people are hitting that web page, where they are coming from, what device, and what platform. With Google Analytics, I can see an amazing amount of metrics across a variety of categories. With many API warehousing companies such as Gnip, Appinions, and OpenCalais, a wealth of metrics are available.

The key, though, is what metrics make sense for your business. Are you selling widgets? Or are you trying to build a relationship with a group of people by providing informative content, research, and news? What are your goals in terms of coverage, awareness, market share, lead generation, and sales? What are the goals of your existing communications strategy? After you have determined this overarching set of goals, then it will be easier to determine [which] metrics make the most sense. We've worked in the analytics and monitoring industry now for nearly 10 years and have worked with several different types of analytics packages and professionals including development of some of our own metrics and indexes in several cases. And there are some definite "must have" measurements you want to be tracking in terms of your communications efforts and growing your community.

Integrating Google Analytics into your online newsroom is vital for a few different reasons. First, the package offers a host of reports and measurements that will help show what content is the most popular. Is it a particular news story that keeps getting looked at over and over, or your video section, or is it one of your executive bios? What is the time of day when most people come to your online newsroom? Perhaps posting a story idea or evergreen content item slightly before that day or time might help increase pickup of that particular story. Another big metric inside of Google Analytics is to understand how people are getting to your newsroom. If they are coming from a search engine like Google, monitor what keywords they are searching on to get to your content, and then ensure all relevant content has those keywords. It only makes sense to offer more related content and making it available to those who are obviously already interested. Building relationships through content means you have to provide a steady stream of really good and really useful news, pictures, and videos. Traffic to your online newsroom can be one of the greatest measures. Sure, you want to know the quality of the traffic, but in my experience if you are able to grow your monthly newsroom traffic, the quality of relationships will grow along with it.

Q: How have you personally grown relationships through social media, and do you analyze your own relationships in different communities to make them stronger connections?

A: There are so many ways that I have personally (and professionally) grown relationships through social media. Everything from using Twitter to actually make sales, to using Facebook to generate leads, to using LinkedIn to connect with potential clients. But, also using Twitter to help get a story placed for a client, using Facebook to help promote a friend's restaurant, and using LinkedIn to reconnect with an old business associate who it happened was in the need for my services.

Most of my time in social media is spent on trying to find people that have a problem. That problem is they have great stories to tell about their organizations—so they are PR, media relations, Investor Relations (IR), or marketing professionals—but they have either no control, no time, no budget, or a host of other issues preventing them from maximizing the opportunity for their company. So, with social media, I have just ingrained it into my lifestyle and made it part of me, my personal brand, but bigger than that, my company's brand. I've developed relationships on social media that have led to new clients, new partnerships, new opportunities at existing clients, and new opportunities to speak and share my thoughts with others in my industry. For some of these relationships, I have never talked to the person on the phone or seen them in person.

Personally, one of my biggest successes in helping to grow relationships hinges on finding and sharing content. Whether it is content about PR, online newsrooms, green energy, travel, or sports, I work hard each and every day to find stories I think my followers would find interesting. Even if they might be able to get it from somewhere else, or it is not an original story, I try to aggregate and share the best of what I find each day. This has helped me build relationships in a number of ways. First, people always like when you share their content; it opens the door for them to thank you and for you to establish the start of a relationship with them. Second, when people share my content, I emphatically thank them as quickly as possible and let them know that I appreciate that, also opening the door for me to connect with them in some other way—another social network, or maybe down the road an opportunity might arise. These little "door openings" are amazing, and if you are consistent and forthcoming, there will be hundreds of opportunities to connect with people. Will each result in a client or the lead story in the *Washington Post*? No. But they will provide opportunities to help you achieve your communications goals, whatever they may be.

The Relationship Analyzer Check List

- ✓ Begin relationship analyzing as you plan your communications program.
- ✓ Take a good look at your audience segments, and developing profiles to detail their participation in different communities.
- ✓ Identify what topics of interest drive the influencers in these communities and how focusing on the critical issues work to your benefit.
- ✓ Build an Audience Profile as a helpful resource to identify the needs of each audience segment, to pinpoint exactly where they are congregating, to distinguish what issues/topics interest them, and to allow you to discover the best ways to communicate directly.
- ✓ Ask the Audience Profile questions, such as: What are the benefits/opportunities of interacting with this group? What is it exactly do you want from this group? Are you looking for a specific type of engagement, whether it's learning about your industry thought leadership or you would like to have some type of mutual reciprocation?
- ✓ Define the steps and the behavior you and your company experience as you climb the Relationship Staircase, which include the Casual Friend, the Taker with Good Info, the Giver, the Giver and Taker, and the True Confidante/Brand Champion.
- ✓ Rely on technology such as a MentionMapp or a Touch Graph to help you to visualize the relationship and foster growth from casual awareness to loyalty and advocacy.
- ✓ Understand the culture of the different communities, and apply the cultural norms and group behavior to rally the community on your behalf.
- ✓ Gauge the effectiveness of your relationship based on the activity of your audience in a community—for example, in your own newsroom.
- ✓ Make each community experience different, to accommodate the needs of the members, to respect and conform to the community culture, and to implement the best collaboration practices.
- ✓ Consider the Relationship Boosters on Facebook, Twitter, and Google+ to move casual relationships to higher steps on the Relationship Staircase.

7

New Practice #7: The Reputation Task Force Member

The word *reputation* just may be one of the most talked about words in public relations. As of this writing, a simple Google search on "public relations" and "reputation" produced more than 47.7 million entries. Reputation management has long been a core function in public relations. Another search with the words "public relations," "reputation," and "social media" returned more than 29.4 million resources. Even though reputation management was always an "expected" part of the PR person's job responsibilities, it wasn't necessarily an every day, every minute function. Of course, there were times PR pros were relied upon more to mend a damaged image. Unfortunately, it was usually after a negative situation or crisis occurred. With social media, there is no waiting for a crisis to strike; reputation monitoring and proactive management becomes a much larger part of your daily focus.

There are serious consequences if you don't pay careful attention to reputation, especially in the age of public conversations. Today, your audience has an audience and so on. Social media creates connections that make sharing instantaneous across a human network, which is made up of personal cluster networks where peers trust peers. Companies can't control the conversations and, in many cases, they don't even cause the controversy or the damage they experience. A perfect example was the Dominos Pizza crisis. The company certainly didn't expect, create, or cause the situation that occurred in April 2009. Two employees at the Conover, North Carolina franchise decided to pull a prank, videotaping disgusting acts, as they prepared food for customers. Then, they proudly broadcasted their tainted food creations over YouTube.

Unfortunately, the situation just happened, and there was no way to stop it from occurring. As a result, the Dominos brand faced serious consequences. Even though the CEO, Patrick Doyle, made a heartfelt public video apology via YouTube, and the two employees were fired and faced felony charges, damage to the company's reputation went on long after the posting of the video. According to an article in *The New York Times*, "The perception of its [Dominos] quality among consumers went from positive to negative...according to the research firm YouGov, which holds online surveys of about 1,000 consumers every day regarding hundreds of brands."[1]

The events that took place immediately affected Dominos sales and productivity. An April 2009 *Forbes* article pointed out a national study conducted by HCD Research, which revealed approximately 65% of survey respondents, who would have previously visited or ordered from Domino's Pizza, "Were less likely to do so after viewing the offensive video."[2] Then, in September 2009, the Conover, North Carolina franchise, where the incident occurred, was forced to shut its doors, as a result of the social media prank.

Of course, on the other end of the spectrum are the companies less than careful with their reputations. For instance, Kenneth Cole, chairman and chief creative officer, decided to tweet about the uprisings in Egypt. His tweet made light of the situation, stating the uproar was a result of the new KC spring collection. When the CCO used the #cairo hashtag on Twitter, not surprisingly, the tweet caused tremendous backlash. Numerous tweets rang loudly throughout the Twitterverse; some went as far as calling for a boycott of the company's products. Others ranged from "Insensitive and not funny" to "It's surprising how some companies still don't get what social media is...." Of course, the chairman and CCO apologized for the insensitivity; however, there will be consumers who may choose not to purchase from Kenneth Cole in the future. If you know Twitter, then you would call the incident a "#fail" in reputation management.[3]

Practice #7, **The Reputation Task Force Member**, is a practice based upon the increased need to:

- Be more proactive with brand reputation.
- Provide internal education about brand value and voice.
- Build a team of relentless sentiment auditors.

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1 Clifford, Stephanie, "Video Prank at Dominos Taints Brand," NYTimes.com, April 15, 2009.

2 Vogt, Patrick, "Brands Under Attack: Marketers Can Learn From Dominos' Video Disaster," Forbes.com, April 24, 2009.

3 Ehrlich, Brenna, "Kenneth Cole's #Cairo Tweet Angers the Internet," Mashable.com, February 3, 2011.

The Reputation Task Force Member is a natural position for the PR person who usually is immersed in the negative communications issues, the crisis situations, or the damaged reputation. PR professionals also have the knowledge and skills to minimize or neutralize the issues and concerns. If given the opportunity, PR can do this before the social media floodgates open completely. Your new practice (see Figure 7.1) starts in the monitoring/tracking phase of your social media plan and extends into your channel development and the content you share and must also become a part of your measurement strategy.

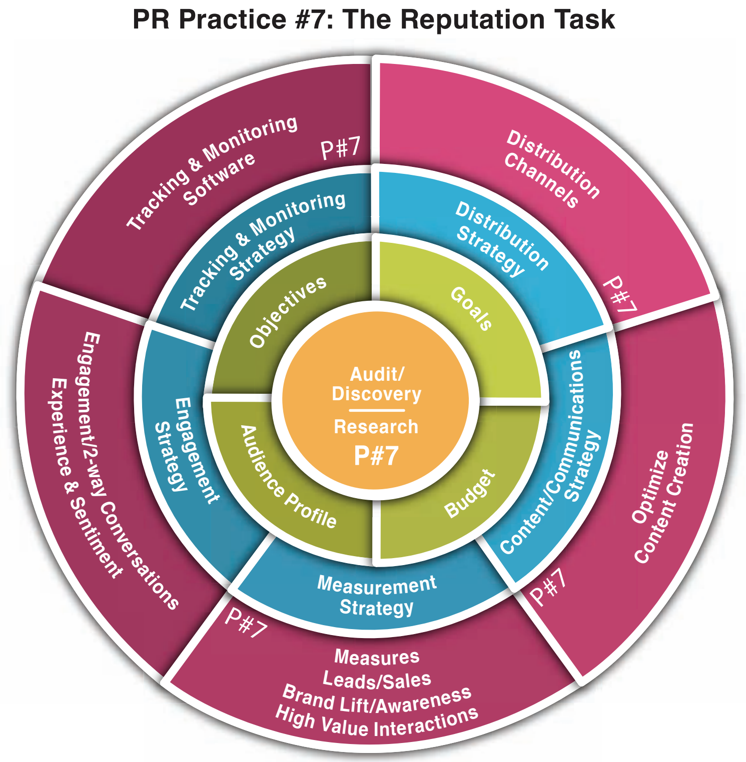

Figure 7.1 The Social Media Strategy Wheel: PR Practice #7

Being on a task force could be an organized effort through the Social Media Core Team or perhaps it's an informal team formed through departments (the Social Media Coalition) that have a mission to monitor for sentiment at all times. Your brand, and its reputation, is vulnerable no matter what type of company. As you can see from the Dominos incident, you don't have to cause the situation; it can just happen. In addition, the

24-hour response time used to be acceptable for traditional media. Now, that kind of timeframe is considered a significant lapse of time, which can cause a brand severe damage.

What Are the Best Practices of the Reputation Task Force Member?

You're involved in several activities when you become a member of the Reputation Task Force, as you work to protect the reputation of your company and your products. A best practice approach for the Reputation Task Force Member is broken into a few areas, which include the following:

- Building the Human Face
- Helping Stakeholders to Understand the Brand's Core Values
- Learning the Best Ways to Monitor and Measure Sentiment
- Growing the Reputation Task Force Team

Building the Human Face

Proactively protecting a reputation starts with the human face. Anyone who has said social media requires transparency and a human face is 100% correct. People relate to people. We are social beings who want to connect and engage with other people in different ways. Your ability to interact and build strong relationships may directly correlate to the transparency and human side you show. Other than following a brand for promotions, discounts, contents/sweepstakes, and the most up-to-date news, do you feel there's a difference in the number of times you connect with a brand based upon whom you're speaking to? Does it make a difference if the brand simply uses its logo on Twitter versus the brand that puts employees front and center, by using their photos as avatars? Do you feel more comfortable when you see an employee's initials at the end of a tweet? For customer service issues, some may find it easier to interact with @Joe_XYZCo or @Mary WidgetCo because you're talking to a specific person, who can relate to what you're saying or better understand how you feel. A person can empathize with you; a logo cannot.

People want to know they are talking, sharing, and creating with other humans. When they have questions, they want the empathy of a person who can recognize their concerns and make them feel at ease. They don't want a canned response or an automated message. The human face and empathy helps to build brand advocates. Build your advocates the right way, and they will be there to tell you exactly how they feel, and also alert you to any issues that are not even on your radar. In addition, these advocates can quickly come to the brand's rescue when negative comments flood into your social properties. Their positive praise often neutralizes the situation, much more effectively and with credibility, even before you address what's occurred.

Being a member of the Reputation Task Force means being more aware of your brand champions and knowing you can enlist their support, in good times and in bad. One college in Massachusetts knew during its snowy winters, for all the students who complained about the snow and trekking to class, there would be student ambassadors on Facebook who would jump into the conversation to tell their complaining peers, "Suck it up and go to class!"

Creating the human face is the first step, and you might even be doing this personally or as a member of a communications team. At all times, you will be upholding the voice and the messaging of your brand, but your own unique voice is what actually breaks through when you engage. If you consistently use the same unique voice day in and day out, your friends and followers can relate more to your personality and look forward to interacting with you as a peer who can offer help, advice, and interesting information—and to ease any concerns. The trust you build often extends directly to the brand

Being on the Reputation Task Force also means you understand the value of employee participation and how enlisting the support of other employees is key to customer engagement. In an interview on the Britopian blog, Jeff Schick, Vice President of Social Software at IBM, mentioned, "...it's closer to 25,000 IBMers actively tweeting on Twitter and counting. Not only are we present on Twitter but we also have over 300,000 IBMers on LinkedIn and 198,000 on Facebook. This is just our external social media footprint." The IBM culture lends hand to numerous blogs and social networks where employees collaborate and innovate internally, too. IBM knew early that having employees interact through social media with customers would make people feel closer to the brand. According to the same interview, the company set up the BlueIQ training team with eight trainers, who started with 16,0000 salespeople being trained on social media tools and engagement. The effort was later expanded, increasing the numbers to a 400,000+ workforce.[4]

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[4] Brito, Michael, "IBM Case Study: A Lesson in Social Business Transformation," Britopian Blog, www.britopian.com, July 5, 2011.

Along with IBM, there are many other great examples of companies with strong employee ambassador programs in social media, including Intel, SAS, Virgin, Whole Foods, and American Express. These companies know if they're successful and experience growth, then the employees will experience the same. When employees act as brand evangelists through social media and help to make the company's brand shine, they are motivated by being more involved. In turn, they offer customers better service, resulting in more loyal relationships. As a member of the Reputation Task Force, you're one of the active internal brand champions, and you begin to help others to understand how the strength of the brand transcends across the company and then outward. Suddenly it's a win-win situation for everyone.

Helping Stakeholders Understand Your Brand's Core Values

If you're familiar with marketing and branding work, then you know the value of creating brand style guidelines or what's known as the *brand style guide*. The brand style guide is designed to keep the brand's look and feel intact and to ensure its messaging remains consistent. You may use a brand style guide (in some cases, it could be as large as a style binder) in different capacities, from sharing the information with printing partners and web service providers to your own external communications usage through different channels. However, you may not have been directly involved in the creation of the brand style guide. What's interesting is most brand style guides have a section dedicated to communication and messaging, including voice, style, and tone. This is right up the PR person's alley because you are responsible for responding to the public, whether it's via the media or now directly to customers in social networks. The Reputation Task Force Member should be more involved in the development of the brand development to help identify and guide brand communications.

Of course, one of the most overlooked parts of the launch of the brand style guide is communicating the benefits internally. When these guidelines are developed, they should automatically be shared with all employees. Then, there's a much greater chance the same messages and core values will be communicated naturally through conversations outside of the company. But the challenge is always making sure your internal army of champions has a good grasp of what your brand stands for, and what customers expect with every interaction.

In 2009, one of the largest healthcare insurance companies in the United States decided it was time to unite its employee forces to have

"One Vision and One Voice" through an internal branding campaign. They educated their managers, who interfaced directly with customers about brand standards and values and prepared a campaign to address their overall communications with customers, partners, and other constituents. The corporate communications department initiated a series of internal brand parties in different office locations across the country to motivate their managers. These rallies were not only educational, but also excited the managers about the brand's core values and how to better communicate those values to the public.

As a member of the Reputation Task Force, you may want to consider a communications initiative to educate and excite other internal champions who can then use the information and enthusiasm to engage more effectively on behalf of the company. It's time to ask for the brand style guide and to make sure all communication through every channel is represented accurately. Communication for a brand must be consistent through different channels, and social media are the new and growing channels. Remember, you're a PR Policymaker too (PR Practice #1), so you should make sure your company's brand style guide is tied to your social media policy. There must be cross-references to enforce both the look and feel of the brand visually on social profiles, as well as the messages, which could take the shape of 140 characters or less, or be weaved into a Facebook update.

Understanding the Best Ways to Monitor and Measure Sentiment

Here's where the PR professional becomes the relentless auditor of social media for brand reputation. Of course, you were always reviewing news clippings and online coverage in the past, making sure that your companies, products/services, and executives were represented in a favorable light. There were times when you saw a story before it went to print, and then there were times you were chasing down an editor to get a retraction. Today's reputation monitoring is a proactive measure saving precious time and energy later, by squashing issues that could affect a brand's reputation.

There are several ways to monitor social media sentiment. As a member of the Reputation Task Force, you may be officially assigned the role of setting up the monitoring for your department, and then coordinating and sharing intelligence with other areas of the company, when you see something is a potential concern. However, there are other members of the Reputation Task Force who are not in communications and may be monitoring as well. These members include employees who are naturally active in different channels and watching closely, from the sales team and product development to HR and customer service. However, being in the communications department and also a skilled PR Tech Tester (Practice #3), you are familiar with different monitoring software platforms. You should have direct access to the tools/resources as you listen to the public and respond in real-time.

Sentiment monitoring may spark an immediate and direct response to an issue that surfaces. To catch what could be the wave of negative wildfire, you want to set up keyword monitoring so that you see any mentions of the company name, executives, products, or services across millions of social media sites. If you use a monitoring platform, you can view aggregated conversations over time, which helps to make sentiments comparisons. Several of the sentiment-monitoring dashboards allow you to:

- Compare fluctuations in positive and negative sentiment on different platforms.
- Review audience emotion and tone of content during specific incidents or events.
- Analyze the sentiment of competitors in comparison to your own over a period of time.
- Watch influencer sentiment closely to make sure it remains positive.
- Track positive and negative sentiment over time, and tie it to public confidence and the brand's overall reputation (done through brand awareness/perception analysis, which can be pre-PR versus post-PR for the long term).

In many platforms, you can report on sentiment in different ways, including a word cloud formation, a bar chart comparing sentiment during different timeframes (before, during, and after a crisis), a line graph mapping sentiment over time compared to competitors, or as a pie chart with percentages of sentiment through various channels.

If you are just starting your social media program, it doesn't necessarily mean no one has been talking about you. The Reputation Task Force Member finds the negative sentiment and makes sure it's addressed immediately. Of course, if you come across a lot of positive praise, you need to share this, too. Encountering all positive sentiment means the brand has many satisfied customer advocates and happy stakeholders. With your strong sense of ethics, your knowledge of the brand voice, and your constant need to be a part of the brand police, participating on the Reputation Task Force is the best way to utilize your skills to uphold, guide, and protect the brand's reputation. Of course, this also includes your own personal brand!

What Makes a Reputation Task Force Member?

Leon Chaddock is the managing director of Sentiment Metrics in the UK. Leon gave his insight on how the Reputation Task Force can monitor reputation and capture sentiment through social media.

Q: What are the social media sentiment monitoring best practices, so PR professionals can keep a close eye on daily sentiment and any negative situations that may arise?

A: In a new and rapidly advancing field, best practices can vary from industry and specific use case and the amount of data collected. If you have a large enough brand, we would recommend using a commercial solution for your monitoring, such as Sentiment Metrics, but there are many others. However, following are a few common practices people should do, whether using a commercial solution or free monitoring:

1. Make sure you check for your mentions at least once a day; new topics and trends can emerge quickly, so it is vital to keep your finger on the pulse.
2. Set up email alerts in your monitoring system or via Google alerts to warn you at least daily (hourly is better) to any new conversations. This is a great time saver as well, as it then requires you to only log into the monitoring system or search services when you want to do a deeper dive.
3. If you have a commercial solution that is sentiment-enabled, then check the extreme sentiments as part of your daily or hourly checks. Just one negative comment can have a ripple effect in social media.

Q: How accurate and far reaching is social media sentiment monitoring?

A: It depends on the sentiment monitoring you are talking about. There is always the debate on human versus automated sentiment. We, for instance, use automated sentiment that can be overruled by the client. We generally see highly acceptable accuracy rates of above 70% in real-time across eight core languages. With this accuracy, sentiment scoring is useful for trending over time and spotting negative or positive events. But, it is important clients understand what sentiment scoring is good for and what it is not good for.

Q: Is there a difference between daily monitoring and monitoring during a crisis situation?

A: Crisis monitoring is different than daily monitoring. With daily monitoring, you usually have set objectives you are trying to achieve. In a crisis, quite often you are in a fluid situation that needs careful handling. We always recommend clients put a crisis plan together before they get hit with a crisis. Nobody wants to be in a firefight. We do extensive crisis monitoring for our clients and also provide evaluation reports on what happened after the event, so clients have a full debrief.

We would always recommend having a social media monitoring and engagement system in place at all times for ongoing monitoring, especially during a crisis, which allows you to know exactly what is happening and respond immediately, if required.

Learning to Grow the Reputation Task Force Team

Most likely, you've realized by now, being in communications means you're a Reputation Task Force Member; it's automatically a part of your job. Either formally or informally, guess what? You're on the team. However, it's an effort that should be spread companywide. Every employee who partakes in social media technically becomes a part of customer service and may come across issues, concerns, reputation damage, and so on during the course of a normal day. It doesn't take a scandal or natural disaster anymore to create a wave of negative sentiment to damage a brand. The more employee brand ambassadors who join the team, the easier the effort to maintain a healthy brand reputation.

It's important your own internal front line knows what the brand stands for and how the voice should resonate with different audiences. Taking the time to educate employees across the organization on brand persona, tone, language, and purpose sends a message loud and clear; employee training and involvement is important. According to Harvard Business Review (HBR), it also takes a clear understanding of the purpose of the task force, so the group can form and work collectively. People in organizations want to be involved in company initiatives that go beyond themselves and have greater meaning.[5]

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[5] Hill, Linda and Lineback, Kent, "The Fundamental Purpose of Your Team," HBR Blog Network, blogs.hbr.org, July 12, 2011.

Of course, having goals in place can also keep people on the task force on track. The overall goal of growing the task force team is to better maintain the health and well being of the company's reputation in the age of public conversations. Seeing positive progress through the growth of your task force, and effective sentiment monitoring and measurement, is an indication of "reputation wins." Positive progress means the participating task force members have done a great job.

Amber Naslund is co-founder of Hidden Startup (stealth until 2012), the author of *Brass Tack Thinking*, and coauthor of *The Now Revolution*. Amber stressed in an interview how a company's reputation must be managed holistically:

Q: Public conversations make it important for PR professionals to listen carefully and respond to brand issues and concerns. Today, PR professionals are automatically placed on a reputation task force that forms within their organizations. However, because social media goes across the company, how can PR professionals educate other members of the organization (beyond the communications department) to join the task force and become brand reputation champions?

A: The same way that overall company reputation is earned holistically, it needs to be managed that way. PR teams can help be the conduit between stakeholders and the organization, but it's critical that business area leaders—from sales to marketing to customer service—are invested in the input from stakeholders that's gathered through all channels, including social media, and that they're empowered to act on that information.

Progress and change can't happen unless the entire organization can actually receive information and data and then make decisions based on that data. Listening in social media is a powerful source of intelligence and information, but it needs to be put on the table in front of a cross-functional team—or at least in the hands of operational-level leadership—so that it can be analyzed and actually acted upon.

Q: Do you think offering more internal brand education, as a part of social media training, can help employees to not only uphold a company's brand voice, but also allow them to inject their own unique voices through social media?

A: Yes, yes, yes. And I wish more organizations did this. In fact, irrespective of social media, companies should be doing this as simply a matter of helping all employees find their own purpose within the company's direction.

The expectations of customers, prospects, and the online audience at large are so different from what we've come to know as communicators. Key messages and corporate statements just don't fly. The people who are communicating with companies expect to be talking with other humans, and they have a keen eye for BS and canned messages. The more you can immerse your people in what you value and why, the more you can learn to trust those things as guiding principles within which individuals can shape unique, genuine, and personalized communication that still upholds the goals and ideals of the company.

Getting employees better invested in their organizations' brands is never a wasted effort.

Reputation Task Force Member Best Practices

Mark Ragan is the CEO of Ragan Communication and the publisher of PR Daily, PR Daily Europe, Ragan.com, and Health Care Communication News. Mark shared his insight on handling reputation in an age of public conversations.

Q: Does social media make it harder or easier for PR pros to manage a brand's reputation?

A: It depends.

For companies that have sophisticated social monitoring tools in place—and more important, trained PR managers who know how to use them—social media is the most powerful channel in the history of our profession.

But for companies that lack a social strategy and crisis response plan, social media can become their worst nightmare. The good news is that most companies have come to recognize this communications revolution and are adapting accordingly. And yet, there is a lot of work to be done.

In my workshops, I often ask a crowded room of PR professionals whether they have a crisis plan in place to address social media firestorms. Only one or two of my workshop attendees typically raise their hands.

Q: Do PR professionals spend more, less, or about the same amount of time monitoring company reputation/public sentiment, as they did pre-social media?

A: There's no contest—PR professionals are not only spending more time monitoring their organization's reputation today than in the pre-social era, but also the overwhelming impact of social has raised the PR profession to an unprecedented place of influence.

More companies are dedicating staff and resources to real-time monitoring of social sites. The mushrooming growth of media monitoring services like Radian6 and Vocus attests to this trend. Moreover, titles that didn't exist five years ago are now cropping up in organizational charts throughout the world: Chief Listening Officer and Social Media Director are now becoming commonplace.

Q: What are some best practices to uphold integrity, ethics, and to maintain a positive brand image through social media?

A: Companies must understand that top-down communication no longer works. Gone are the days when a company could simply push the same, vanilla message to its customers.

Social media is about building relationships, often one customer at a time. One unaddressed complaint delivered over Twitter or Facebook can quickly ignite a firestorm of bad publicity in both traditional and new media.

At the same time, the rapid ascendance of "brand journalism" gives organizations the ability to become media outlets in their own right. No longer content to wait for traditional media to write about them, these companies are providing news and information about their markets directly to consumers. American Express, IBM, Best Buy, The Mayo Clinic, Southwest Airlines—this is just a short list of companies that have become news and information providers. Many of them are scooping up reporters from traditional media and building news sites around their brands. Like Ragan, they are also using the content curation model of mixing original content with aggregated content from bloggers, traditional media, and other online sources.

On the internal side of the business, companies will continue to rely increasingly on user-generated content produced in internal, collaborative networks, so-called Facebook-type sites behind the firewall. The smartest among them are building mobile platforms, so employees can access their intranets from home or while on the road.

But social media also requires honesty, candor, and the willingness to admit mistakes, flaws, and weaknesses within the organization. There is no escaping this new fact of life.

Q: Does social media make PR professionals more proactive about reputation monitoring and measurement?

A: There is no other option than to be proactive.

The traditional, manageable news cycle disappeared years ago. PR professionals can no longer afford to simply respond to what the press reports. Everyone with a Twitter feed or Facebook site has the potential to create news about your organization for good or ill. And it can happen any time and originate from any corner of the globe.

When the Hollywood director Kevin Smith was ousted from a Southwest Airlines flight because he was too fat to fly, he responded with a torrent of tweets to his more than 1 million followers.

Is he the media in the traditional sense? Of course not. But, in the world of real-time social media, his megaphone is as big as that of most *The New York Times* columnists. And to its credit, the airline responded to his criticism in the exact same way it would have responded to a reporter—immediately and with respect.

Q: What are some key resources that you use to measure reputation and brand sentiment in the age of public conversations?

A: We are a small company. We can't afford the big media monitoring sites. So we use every free tool available to us, including Google Alerts, Social Mention, TweetDeck, and HootSuite.

My staff monitors every major social media platform for discussions about the company. I personally respond to any complaint or question directed at us from Twitter, Facebook, Google+, or other social sites.

We have the advantage of being a news organization. My reporters and editors live on social media every day of their lives. It's a rare case where our company is mentioned in the online world and we aren't aware of it.

I also employ a social media director. Her job is to monitor the social space for any mention of the company and make sure we respond to every customer—or potential customer—as quickly as possible. She also acts as a bridge between our customer service and editorial staff and the social world, passing along story ideas, business opportunities, and the sharing of content.

The Reputation Task Force Member Check List

✓ Start with the monitoring/tracking phase of your social media plan, which also extends into your channel development and the content you share, which must become a part of your measurement strategy as well.

✓ Build the brand's reputation by presenting the human face.

- ✓ Determine the correlation between interacting and building strong relationships with the transparency and human side you show.
- ✓ Build your advocates the right way, and they will be there to tell you exactly how they feel and also alert you to any issues that are not on your radar.
- ✓ Identify your brand champions and enlist their support, in good times and in bad.
- ✓ Uphold the brand voice and the messaging of your brand; however, your own unique voice is what breaks through when you engage.
- ✓ Understand the value of employee participation and how enlisting the support of other internal champions is key to customer engagement.
- ✓ Become an educator to help others in your company understand how the value of the brand transcends across the company and then outward.
- ✓ Ask for the brand style guide, and make sure all communication, via every channel, is represented accurately.
- ✓ Assign yourself the role or coordinate with others to set up the sentiment monitoring for your department, and then share intelligence with other areas of the company.
- ✓ Find the negative sentiment, and make sure it's addressed immediately.
- ✓ Grow the Reputation Task Force Team by organizing an effort to teach about your company's brand promise, value, and its voice.
- ✓ Educate the front line so that they know what the brand stands for and how its voice should resonate with different audiences.
- ✓ Take the opportunity to get involved in company initiatives that go beyond your individual self, and have greater meaning.

8

New Practice #8: The Master of the Metrics

Historically, measurement has been a tough practice, even before social media came onto the scene. PR professionals have worked tirelessly to show how public relations can lead to valuable business outcomes for an organization. One of the greatest challenges is to reveal the "tangibles" of PR. However, many professionals decided this translated into impressions (eyeballs) and the value of media coverage, if the coverage were converted to advertising or *Advertising Value Equivalents (AVEs)*. Ask any PR measurement professional and you quickly learn how and why you should move beyond the practice of AVEs, once and for all.

According to the Barcelona Principles, which provide a set of standard practices, PR requires goal setting and measurement. The Barcelona Principles state, "Fundamentally important, goals should be as quantitative as possible and address who, what, when, and how much impact is expected from a public relations campaign." They further discuss how, "Traditional as well as social media should be measured to capture changes in stakeholder awareness, comprehension, attitude, and behavior....We need to think in terms of communities of 'stakeholders' as the power of communications shifts from companies and institutions to communities of individuals." Because of this shift from companies and institutions to individuals, it's imperative to uphold good measurement practices.[1]

Social media doesn't change good PR measurement practices, although it may add to the complexity. The same principles you learned in PR about outcomes (quantifiable changes in attitude or behavior)

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[1] Grupp, Robert W., "The Barcelona Declaration of Research Principles," Institute for Public Relations, www.instituteforpr.org, June 18, 2010.

versus outputs (the tangible elements in your campaign) and the outtakes (the key messages that you want your audience to take away) still hold true. As you discover there are many metrics in social media, you need to show your social media measurement directly ties back to higher-level business goals—that is, reduction in expenses or increase in revenue. The executives of the company who create these business goals look for specific indicators that reveal how the organization's needle moves toward profitability and a more reputable business in the eyes of the public. At the same time, there are also metrics that expose lower-level community interactions and Return on Participation (ROP), which are important for campaign progress. You can practice good social media measurement by setting up a program to differentiate metrics; one that enables executives to focus on how engagement leads to business outcomes.

According to Katie Paine, author of *Measure What Matters* (Wiley, March 2011) and CEO of KDPaine & Partners, "The key to good Social Media Measurement is to be clear about the goals. Is the intent to reduce marketing costs? Improve positioning relative to the competition or the marketplace? Shorten the sales cycle? Too often, people 'do social media' because it seems like the thing to do. But without clear definitions of success, you have no idea whether you are moving forward or not. What you should be measuring is your performance relative to the marketplace. Social Media is a conversation in that marketplace, and it's not all about you. You need to understand how you are performing relative to the competition."

Practice #8, **The Master of the Metrics**, came to fruition when PR professionals were tasked with showing more measurement and accountability. In an age when social media was first thought of as one big cocktail party, PR professionals must deliver the value social media brings to the organization. Setting up the appropriate metrics and reporting measurement has always been a critical part of your communications strategy. As you plan a social media program, measurement is carved out as a separate section of focus (see Figure 8.1). Creating the appropriate metrics and tracking changes over a period of time help to prove the value of PR and social media engagement. Metrics are also necessary as business executives decide whether to invest more resources into their employees' social media participation and shared experiences with their stakeholders.

Setting up social media measurement means you must have a full understanding of the metrics available from simple community participation to more complex engagement. These are the metrics that illustrate how a company is reaching higher-level business communications goals, as well the metrics that benchmark the goals for different types of social media participation by department. The Master of the Metrics quickly discovers the C-Level Suite or senior leadership team has their own view and expectations of metrics versus what departments/community managers and other employees involved in your social media programs expect to review from their initiatives.

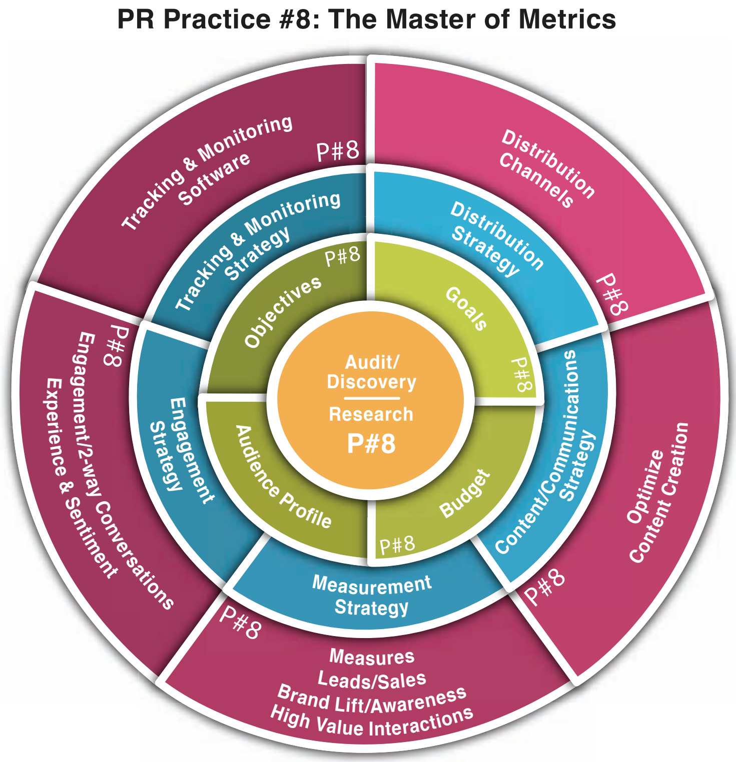

Figure 8.1 The Social Media Strategy Wheel: PR Practice #8

What Are the Responsibilities of the Master of the Metrics?

As a Master of the Metrics, you have many responsibilities. You must make sure your organization is capturing the metrics or Key Performance Indicators (KPIs) on the macro level, which is across the entire organization, and you're also helping to guide metrics on a micro level (by department). You can break your new practice into the following areas:

- Understanding Social Media ROI for Executives
- Discovering a Six-Step Metrics Process for Programs Across the Company
- Determining the Difference Between Inform, Inspire, and Engage Metrics

Understanding Social Media ROI for Executives

There is no one accepted measure or set of metrics to determine the return on public relations investments. When executives evaluate PR, they consider how public relations leads to business growth or how it relates to leads, the sales cycle, crisis management, strategic partnerships, recruiting the best talent, brand visibility, competitors, and stakeholder relationships. Public relations' use of social media is no different and must offer a quantitative look at the business impact. However, the term *Return on Investment (ROI)* is thrown around loosely in communications. Too many professionals think of ROI as results of an initiative, but not always as a business outcome that ties to a company's bottom line and profit.

When you discuss ROI with an executive, especially at the C-Level, ROI means the money portion. It's the return in dollars, minus the initial investment for the initiative, divided by the initial amount of the investment, multiplied by 100. If there is a positive difference, then that's the positive percentage of ROI, and it's a win for the company. To simplify, say you hire a community manager at $40,000/year to create and manage your social media promotions, and your Facebook page generates $50,000 in product sales (from click to conversion) that same year. If no additional costs were involved in the Facebook promotion development, then your ROI is 25 percent. You've made a good social media investment.

Shares, comments, impressions, tweets, retweets, views, and increases in "likes," friends, and followers during a campaign do not directly equal the ROI an executive requires you to deliver. These metrics don't highlight how the company reaches higher-level business communications goals. Although these are indeed important metrics, they do not directly connect to the company's bottom line. Of course, it's a different story, if you take the same tweet, coupled with a promotional link to a landing page on your website, where people can purchase a discounted product for $500.00. When 10,000 people click the link and complete the sale, well then, the initiative definitely contributed to the company's bottom line.

It's not that your executives are uninterested in the many types of metrics that can be measured, or all of the incredible resources and platforms to get the job done. It's just that they have a minimal amount of time and they look at specific values. If you have their attention, say only once a week or once a month for a one-hour meeting, you need to have the right metrics available. Metrics should be presented the way your executives expect them, which means in a report format that's easy to digest quickly. Most of the growth areas of interest to executives can be measured through social media analytics, but you also need to integrate other forms of measurement for a clearer picture of your company's communication growth over time (including surveys, opinion polls, one-on-one interviews, brand audits, SEO metrics, website analytics, and so on).

Public relations and social media can deliver ROI. The launch of GM's FastLane blog is an excellent example of how communication with customers, in a social community, showed a return directly related to a financial bucket. Bob Lutz, former GM vice chairman, spoke at the PRSA International Conference in Detroit 2009. He discussed the initial launch of the FastLane blog and how it was one of the first blogs personally written by senior executives. However, his communications professionals at GM were there to counsel on customer comments, topics, and situations. GM executives used the blog to gain valuable customer feedback. Social media saved the company approximately $180,000.00 a year in research costs, which would have gone toward traditional focus group research. In addition, GM experienced enormous goodwill with customers whose voices were heard directly by executives. When you look at the ROI of the FastLane blog, it's easy to see how social media tied to a higher-level goal and affected the company's bottom line.[2]

Finding the ROI for executives also requires clear objectives, both quantified and measured over time. For example, you can measure awareness by monitoring product conversations, especially as they relate directly to specific product launches or campaigns. Your objective may be to "raise awareness of XYC Co's new widget campaign by increasing the number of relationships with influential widget bloggers, from 10 last year to more than 25 this year." Off course, having access to website analytics during the campaign determines if there were a correlation between higher conversation volume and the increase in blogger relationships, and how this impacted traffic to the website (for consumers to access more product information).

[2] The Public Relations Society of America, International Conference, Bob Lutz Keynote Speech, Detroit, Michigan, October 2009.

If you can tie together the elevated levels of conversations, an increase in relationships, and raised traffic patterns (through an overlay graph via your monitoring platform), then executives will definitely take notice.

Remember, measurement is not a set of isolated clicks or brand mentions. You often need to compare the metrics you find in social media and analyze them against other data (web analytics, sales, number of customer service complaints, number of service calls, and so on). For example, if spikes are in the daily volume of conversations or your *Share of Voice (SOV)*, which is the amount of mentions in various platforms, you would also look to see if spikes are in traffic to a specific area of the website (noting the source of the traffic). At this point, you can use website analytics to measure from click to conversion. At the same time, you can compare your SOV against that of your competition to evaluate if conversations, mentions, or coverage is greater or if it pales in comparison.

Executives are also interested in brand reputation and sentiment metrics. For example, you can measure brand sentiment by capturing the positive, negative, and neutral mentions about your company, its products, services, and executives. The information can be captured through social media monitoring software (free or paid software) that enables you to track over a period of time. You can benchmark the increases and decreases of the following: net brand and net industry sentiment; sentiment before, during, and after a PR campaign; and sentiment before, during, and after a crisis situation.[3] You also must compare the company's net brand sentiment to competitors in the market. Are your stakeholders speaking more favorably about competing brands, and if so, why? You can use these metrics to show executives how net brand sentiment changes over time. The information you provide can allow them to gauge the attitude of stakeholders through network conversations, shared experiences, and via online media and blog coverage as well. Social media metrics provide a good indication of brand reputation as experienced through the company's social media channels.

In all cases, the social media metrics captured during your PR programs should tie back to your goals. However, these metrics can't be viewed in a vacuum, especially as your programs are in conjunction with other areas of marketing. Remember, public relations and its use of social media is a part of the mix. Your metrics must be looked at simultaneously with marketing, advertising, and the measurement of other digital

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[3] Rodgers, Zachary, "Razorfish Proposes Social Influence Score," Clickz.com, July 14, 2009.

initiatives. However, you can see the PR professional's use of social media can lead to bottom-line ROI. Of course, you must ensure you illustrate the difference between what metrics your executives need on a macro level (to show the business growth) versus what's measured for departmental initiatives, which all should map to program goals.

Discovering a Six-Step Metrics Process for Programs Across the Company

As the Master of the Metrics, you also must figure out how individual departments (including the communications department) use social media metrics to evaluate individual program goals and the strategies employed. All department efforts, of course, should support higher-level company communications goals. But, social media measurement is also a required practice to show the success of the specific department initiative. Being on the Core Social Media Team, you should encourage departments and internal champions to take advantage of the monitoring and measurement practices, so they can gather meaningful metrics and report program success.

Using a six-step process, here's how you can help your department as well as other departments in your organization to focus on using and evaluating analytics to measure what is or isn't working in social media programs. Necessary adjustments to campaign/program tactics and reaching departmental goals and objectives may be tweaked along the way. All programs from the macro level down to the micro department level need goals and objectives with supporting strategies and tactics.

Following is how the higher-level goals and supporting metrics may filter down to the department level. If these goals include reputation/image, dialogue and engagement, advocacy/relationship building, sales revenue and leads, and thought leadership and stakeholder education, then use this outline to determine what needs to be captured in terms of metric reporting by each department, per program:

1. Review sentiment metrics on a weekly basis (or as needed depending on the program or situation). You should focus on any negative sentiment first by correcting any miscommunication or helping community members. Sentiment metrics also enable you to find opportunities to use positive sentiment as a means to create endorsements or relationships with new influencers/brand ambassadors.
2. Review peaks and valleys of daily volume (mentions) during your programs to see which conversations and topics peak at certain times. You can use the same types of communication methods or share

similar content in your next program based on what worked with your audience (and their audience) in a social community. You should also learn from the metrics how to close the gap between the peaks and valleys by injecting proven communications and content during the "valley" phases of your next campaign.

3. Review audience activity in your programs, as participation relates to the content you share. You can set up bit.ly or Ow.ly links or use Google URL builder to track link activity, and whether audiences click through to review and share your content, or if they participate further by registering, purchasing, or asking for more information. Links are often created for specific programs, and even particular channels, and they enable you to evaluate the effectiveness of your content in reaching program goals.
4. Analyze SOV metrics during your programs. This includes identifying the networks with the most activity and determining if the activity is based on the type or format of the content shared, the nature of the topics, influencers who work with you at the time, and the timing of other newsworthy events that took place. Understanding the SOV metrics enables you to plan similar programs based on what has worked in a particular network. If your metrics reveals successful strategies in one network, you can tweak the strategy to meet the needs of a different community underperforming to spark more engagement. Compare your metrics against the SOV of your competitors in the same network.
5. Review relationships with top influencers and customer advocates by reaching out and thanking them, rewarding them, and asking them to participate in other interesting programs that would also interest their communities. You can also involve your influencers in brainstorming sessions to see other ways you can work together. You must keep an eye on your influencer participation metrics versus the increase of overall community member participation.
6. Thought leadership, for each of your social media accounts, is an important metric to capture. In some cases, you can monitor increases in Klout, check Traackr rankings and PeerIndex scores, and then tie these metrics to program activity. You can evaluate the number of influencer mentions and positive messaging about specific programs, products, or areas of the company. You also need to use tools, such as Twitter Grader and Facebook Grader, to capture metrics that evaluate department profile scores based on your community participation each month.

Of course, there is no shortage of metrics to capture. The six steps are to guide your efforts. However, as you explore social media and what's available through technology to spark stakeholder passion and participation, you can add to the steps to reveal additional ways to show social media program success in your department(s).

Determining the Difference Between Inform, Inspire, and Engage Metrics

When a company makes the decision to participate in social media, there are three phases of participation. At each phase, metrics can be captured with varying levels of importance. These phases follow.

Phase I: Inform

The *Inform phase* is the level of participation that focuses on your own social media actions rather than those of your peers. For example, it includes the number of times you post on Facebook or Google+, how many times you tweet a day/week/month, the number of videos you upload to YouTube, or the photos you post on Flickr. The inform stage is clearly informational and centers on your company's news, information, and timely updates. (You've listened and now you're sharing helpful resources.) But there is little or no interaction with your stakeholders. At this point, your metrics are focused on what you do and not how or what others do with the information you share. These metrics are quantified and can be evaluated over time. You can view the increases and decreases in your outputs by department or your overall company's sharing habits. Based upon past experience, executives are less interested in these metrics. Although, they are valuable to track because they show overall social media participation and the frequency at which you share your news and information versus the company resources expended for social media communications.

Phase II: Inspire

Moving up a level to the *Inspire phase* means you now motivate your constituents to use the information you provide and to further share their experience. In other words, you inspire them to either pass along your stories to their own networks or to create new content based on what you offer. The Inspire stage is much more interactive with dialogue, and it's during this phase the seeds of the relationship building process are firmly planted. Examples of metrics you capture throughout the Inspire phase include:

- Number of comments you receive
- Increase in community growth
- Number of views or impressions on your page
- Number of tweets or retweet by influencers and customer advocates
- Number of articles, blog posts, videos, and so on generated by consumer advocates, influencers, and the media
- Brand sentiment about the information you share
- Awareness and reach based on number or spikes in conversations

The Inspire phase is a critical step toward true engagement and building a stronger relationship; the point beyond awareness and interest that moves your audience toward loyalty and advocacy.

Phase III: Engagement

The Engagement phase is the highest level of interaction with people in your communities. When you truly engage with your stakeholders, you are deep in conversation that leads to valuable business outcomes including leads, sales, customer-service satisfaction, cost-savings, and strategic relationships. These are financially-based metrics as well as the higher-level qualitative information, which includes education and learning, greater awareness through editorial coverage, reciprocal behavior, sentiment as it relates to reputation, customer service success stories, and product and service research/intelligence. At this stage, engagement is often a co-created experience. You ask your community members to help you solve a problem, tell you what kind of communication they want to receive via social media, and work with you to create a better overall brand experience. Crowdsourcing is your highest level of interaction, and the knowledge you gain can help you to be more efficient and meaningful with your communication moving forward.

"As you evaluate your metrics, pause frequently and ask, 'so what?'" explains digital communications leader Valerie Merahn Simon who is also the co-founder of #HAPPO, a Twitter-based initiative to facilitate new networking opportunities for job seekers and employers in the public relations industry. In an interview with Valerie, she discussed how the goal of a social media effort is not to be successful at social media, but to play a role in driving the success of your business:

> Looking at growth in the size and engagement of your social communities over time is not enough. Whether you have a Facebook

community of 10 or 10,000, so what? To understand and improve the real impact your efforts are having on your organization, you must identify metrics that place a focus on business outcomes, such as sales or donations, event attendance, customer service and support, product development, and recruitment and retention.

Be mindful that analyzing the official social media channels of your organization is not enough. Employee networks post a formidable power. As of November 3, 2011, LinkedIn claimed more than 135 million members. Facebook boasts of more than 800 million active users, and Twitter cites more than 235 million users. An abstract understanding of how your employees are using social media is one thing; identifying tangible ways to leverage these powerful networks is another.

According to the October 2011 Booz & Company/Buddy Media Survey 65% of organizations now have social media policies and another 29% are currently in the process of developing or planning a policy. With these policies in place, and employees well connected throughout their respective industry, companies are poised to better harness their employees networks to strengthen the organization.

As the economy begins to turn, one tangible way that businesses can capitalize on these networks is to fill the inevitable hiring needs by integrating a social component to employee referral programs. A coordinated effort between HR and public relations to offer continued social media training and guidelines is essential. Those responsible for social media within the organization must guide the efforts, making sure that messaging and responses are consistent with the brand and with the brand's behavior in different online communities. Effective social media metrics for recruitment must not be limited to simply the number of friends or followers on a career specific Facebook page or Twitter account or even the number of conversions from blog/Twitter/Facebook campaigns to candidates to hire. Metrics should assess the speed or length of the recruiting cycle, the quality of the hire, changes in costs of traditional recruiting events and paid advertisements, and over time retention rates.

Integrating social media into business processes is an investment, but by implementing measurable goals aligned with business performance, measurement is not limited to historical statistics, but a valuable roadmap indicating the benefits, opportunities, and challenges social media poses to your organization.

As the Master of the Metrics, you must guide your organization from the Inform phase through to the Inspire phase and then all the way to the highest level, Engage. Notice there will be social media properties that maintain an Inform or Inspire presence, if this is the goal of the interaction. For example, there are companies that use the company's Facebook page or their Twitter feed to provide the latest in news, product updates, and special promotions, along with some sharing that leads to greater stakeholder interaction. However, these same companies offer separate social properties for customers and other stakeholders to interact directly and more dynamically with employees of the company, the types of interactions that lead to customer loyalty, and advocacy.

What Are the Best Practices of the Master of the Metrics?

Shonali Burke is an award-winning communications consultant, speaker, and the founder of Shonali Burke Consulting. She shared her thoughts on how PR Professionals can become Masters of the Metrics.

Q: What are the biggest mistakes PR professionals make in their PR and social media measurement?

A: There are three fairly common mistakes. The first is that PR professionals don't set measurable objectives. They have ephemeral targets, such as "buzz," even if they usually set overall goals. However, not setting quantifiable, time-bound objectives is actually counter-productive to your measurement program. Professionals need measurement built into their programs, and these must be specific measures. Otherwise, it's tough to create a strategy that helps you work toward reaching these objectives. That's why I say measurement and strategy go hand in hand.

The second common mistake is focusing predominantly on output measures, such as followers, fans, impressions, or how many people are in your Google+ circles. Unless you have 50,000 followers who all take action, that's not impressive. Only about 1% may take some type of action, based on your communication. Therefore, those numbers can be misleading, if you are solely using them as your metrics—I call them "vanity" numbers. Of course, having large numbers is not a bad thing because with higher numbers, the greater the chances of your message being disseminated and amplified, in and through your communities. What it comes down to, though, is engaging people through your communications, which is what makes public relations so exciting in this day and age.

A common third measurement mistake is PR professionals set up objectives, but then they don't track them consistently over a period of time to analyze the intelligence properly. Timeframes must be consistent, so when it comes time to review the data, you're not looking at Twitter followers from month to month and some other metric being measured from week to week. Many professionals overlook the value of Microsoft Excel, Google Analytics, and the latter's URL Builder tool. These are three tools that give you a way to look at your online data and what's working; and Excel can be particularly valuable in letting you create a simple measurement model, where you can plug your numbers in and see what's working (or what's not). And if you're tracking everything over the same timeframe, then it's easier for you to make the correlations that will be helpful in your analysis.

Q: How do you show C-Level executives the ROI of social media?

A: The term ROI is thrown around so much that it almost makes you not want to use it. But if you do, you must realize that it's an established financial calculation. A great deal of the measurement we talk about in social media relates to impact. An excellent example of impact and metrics to show campaign progress is the USA for UNHCR Blue Key Campaign, which helps more than 43 million refugees worldwide. As a nonprofit program, there was no funding for outtakes, such as surveys, so we focused our efforts on outputs and outcomes. The metrics were set up and tracked consistently. As a result, we saw how outputs allowed us to reach our campaign objectives. We needed to reach 6,000 keys in December 2011. Our metrics showed how the number of key purchases grew, especially as the Blue Key Champions (the bloggers who volunteered their time to help raise awareness about the refugee crisis), as well as other consumer advocates began writing about the campaign.

For example, the Blue Key Campaign used Twitter "Tweetathons" to increase the number of key purchases as well as awareness of the campaign. Receiving notifications in real time, we witnessed the direct correlation between the number of key purchases and our Tweetathon activities, which usually spanned a 12-hour day. Making those correlations are important to executives, and how you track your work reveals the impact and value of your efforts.

In a sense, the Blue Key Campaign was a lab for me to experiment with metrics, and it was interesting. The one thing that really stood out was the search results for Blue Key before the campaign. At the beginning, a search for "blue key" would bring up a link to the campaign site or USA for UNHCR's site, but it would be deep in the search pages. You had to sift through pages of links to get there. However, as we included the Blue Key

Champions in the campaign, and as they wrote blog posts and linked back to the Blue Key site, the site started moving up in Google SERPs as well. Now, the website shows up on the first page of the search engines. This is important because by nature, people who search will not go through several pages to find a link. They don't click Next and then Next again. They will look at the first page and leave if they don't find a link to their planned destination.

We showed how search rankings were up, how people were talking much more about the campaign via hashtag conversations on Twitter and our Tweetathons, and how email leads were increasing as well. By tracking the analytics, we could see how these metrics affected the overall campaign. The information mentioned here is useful to organizations, especially if they're gathering email addresses for marketing, which minimizes the cost of acquisition. It's this type of impact that helps the executives to understand the value of the program.

Q: Do you think PR professionals need to include additional data to show how social media leads to valuable business outcomes? For example, should PR pros have access to website analytics and sales data during their PR campaigns?

A: Yes, absolutely. And using tracking URLs is a key part of that. As I said earlier, Google Analytics URL builder is not used to its fullest capacity. If you're using tracking URLs, such as Bit.ly or Ow.ly, they track only on their own platform. For example, if you have a specific link tied to a landing page for your program, and someone wants to reshorten the link, you won't be able to access all of the data you need if they use a different URL shortener. But if you use Google's URL builder, which contains your tracking code, then it doesn't matter if someone shortens or reshortens the link using their favorite URL shortener; you can still see traffic patterns via specific platforms in your Analytics.

We noticed during the Blue Key Campaign how the traffic patterns changed after the first phase, and we wouldn't have known this had we not set up tracking URLs for the campaign. It's always fascinating to see what's working. Google URL builder was a critical part of the program. We created tracking URLs for three specific landing pages per channel (for example, Twitter, Facebook, and so on) and shared them with our Blue Key Champions. For example, for Twitter, we had three specific URLs for Twitter Tweetathon participants to either purchase a key, go to the About page, or access the home page of the Blue Key site. We would periodically remind our Champions to use these specific URLs to keep track of campaign traffic and the engagement.

This allowed us to see which platforms were sending the incoming traffic. It's interesting to note because PR professionals have not included URLs in a lot of their media relations work. Tracking links is also a perfect opportunity to see how journalists are taking advantage of the information you send or the story you want them to cover. If you're working with a key group of journalists, let's say 30 of them for a particular program, you might want to use a specific URL in your pitch. Then, you can see who's clicking through, and to where. This helps you identify what information is being used the most. If you have good relationships with the reporters, you can even ask them to embed the links in their stories. Doing this could help you not just see which stories are having the most impact, but might even help you improve your pitch. (If they're not clicking through your pitches, for example, is it because the pitch is poorly-written? If you're pitching the wrong group of people, then you have another problem altogether!)

PR people should have access to different analytics depending on the program. You may need to review sales data, downloads to a white paper, registrations to a newsletter, or website analytics. It's important to experiment, and if you can't set up analytics for your company, then you should try to set up metrics for yourself, such as on your blog. Experiment and play!

Q: What advice would you give to PR professionals who have to show more accountability for social media in their PR programs?

A: When you're asked to be in charge of a program, it's flattering, but it's also a huge responsibility—and that's where accountability comes in. We are the voice of the business. When working in social media, public relations professionals have to be careful. We have to inject personality and humanity into our outreach and communications, giving a social face and voice to the business. At the same time, we have to think about how we are building and energizing communities to reach our objectives. It takes a lot of energy and time spent online.

With respect to measurement, you have to make sure people in the organization and the executives know what you're trying to achieve and the value social media brings to the organization. Executives want to reach their business goals, and if you can show them how it's done through social media, then they will want to help you. Internal education is a key component to any program. As social media has become more popular, it doesn't necessarily live in the PR department. However, there has to be an understanding of what social [media] is trying to do and how working together leads to greater impact. Most organizations need education, and PR professionals can do this in the form of case studies, test campaigns, and examples of how social media has helped companies to reach campaign objectives.

Master of the Metrics Check List

✓ Set up social media measurement with a full understanding of the metrics available from simple community participation to more complex engagement.

✓ Make sure your organization captures the metrics or Key Performance Indicators (KPIs) on the macro level, which is across the entire organization, and you're also helping to guide metrics on a more micro level (by department).

✓ Discuss ROI with an executive, especially at the C-Level, ROI as the money portion or the value social media brings to the organization in terms of leads, sales, recruitment, cost-savings, customer service satisfaction, crisis mitigation, reputation management, market share, competition, and so on.

✓ Integrate other forms of measurement for a clearer picture of your company's communication growth over time; don't measure in a vacuum.

✓ Present social media metrics the way your executives expect them, which means in a report format that's easy for them to digest quickly.

✓ Track metrics for executives and develop a spreadsheet to show analytics over time, including reputation/brand sentiment, awareness or aggregated daily volume as compared to competitors, and SOV in different networks versus a competitor's SOV.

✓ Observe your department's metrics simultaneously with marketing, advertising, and the measurement of other digital initiatives.

✓ Use the six-step process presented in the chapter to help your department, as well as other departments in your organization, to focus on using and evaluating analytics to measure what is or isn't working in social media programs.

✓ Identify the three phases of participation in your organization (inform, inspire, and engage) and determine the metrics that can be captured, with varying levels of importance.

✓ Evaluate your social media metrics by categorizing them into lower-level community participation versus higher-level adoptions that lead to business growth; you can do this for different social media profiles.

9

Using Your New PR Practices to Become an Influencer and Change Agent

Congratulations! You have successfully made it through your eight new PR practices. Diving into the eight practices, as you have learned going through the pages of this book, requires a new mindset on your part, as well as the people around you. You also must be flexible and open-minded with the peers who interact with you, from co-workers and industry colleagues to the customers with whom you engage in your peer-to peer-relationships. It's your peers who can affect how each new practice is shaped, and how you share, collaborate, innovate, and build stronger bonds with them. Remember, being strategic in communications, especially in social media communications, involves having the end goals in mind; the focus should be on the shared experiences with the people you want to engage and the strong relationships you want to create as a result.

If you were to review all the eight practices, from the PR Policymaker and the Internal Collaboration Generator to the Pre-Crisis Doctor and the Master of the Metrics, you would quickly realize each one has a common thread, starting with your relationships. When you need to take the lead or champion an initiative, especially if it's new or unfamiliar, it takes your willingness to think differently and to apply new knowledge and skills. You also must gain the trust of others, who can allow you to guide them in a new way. Do people trust you? Do you motivate them to want to participate in the unknown? Does your personality challenge them to strive for better both personally and professionally? Are you close enough with your peers to keep them informed and feeling they have updated insight and the guidance that they need? And, how do you get those people to act and bring other people on board?

If you think these traits or characteristics sound similar to the many discussions you've heard about influence, then you're right. Although influence is viewed as an algorithm that captures reach, resonance, relevance, impact, clout, and so on, several personal characteristics come into play with a person's influence. In public relations, professionals have typically been classified as the liaisons or handlers of organizational communications. Not a "bad" label, but not necessarily true of the entire role you play today or the skills necessary for you to perform. When PR meets social media, the result is daily change. Suddenly, your role opens up to become a champion of information and new knowledge; you're an educator, a direct communicator, and an influencer—yes, that's right, an influencer! You have the ability to move people to action. However, the role of PR influencer is always to benefit your network of peers and not to grow your own popularity (although popularity often grows as a result of influence).

The influence equation involves how you spark behavior or actions in others. Will the people you inspire and motivate move along with you toward social media change? If your peers are adopting a new social media policy (The PR Policymaker), they use PR technology for better collaboration in your department (The PR Tech Tester), or perhaps you established greater steps for crisis preparation (The Pre-Crisis Doctor), peer involvement, and action signify Change Agent status. Influencers are also Change Agents. You become the propelling force that moves toward new practices, creates positive change and impact, and leads your peers to productivity, collaboration, or innovation.

What Is the Responsibility of the PR Influencer and the Change Agent?

When you think about influence, there are so many different definitions and calculations. No one has said there's a right way and a wrong way to view or build influence. And no single organization has come out with the only "influence" calculation as an exact science. Studies are published every year on influence, and to some, it appears to be a game of numbers, from influencer rank to their reach and resonance. But if you dissect influence, certain characteristics are present that register high on a peer's "value scale."

As a PR influencer, your responsibility begins with moving away from the numbers, for the moment, and focusing on the characteristics to "create" influence. Do you think it's possible for an ordinary or average PR person to cultivate certain characteristics and become noticed, appreciated, and recognized? Can this individual be regarded as someone with influence?

Social media enables anyone, from the outgoing to the introverted, and the well known to the less noticed, to have a voice and a purpose. Communication professionals who focus on cultivating their "special" characteristics when combined and practiced in a greater capacity achieve influence.

The person who becomes the influencer consistently demonstrates at a heightened level the following qualities: trust, in-depth knowledge, industry expertise, intense motivation, pure passion, a winning attitude, and a giving spirit. Also critical for influence is having the right people around you; those who support your efforts and who are your brand champions.

Building the Characteristics of Influence

Although discussions vary about the characteristics of an influencer, following are a few notable traits of many of the many social media and PR rockstars:

- **Trust:** Trust is visible within your closest relationships. Your peers rely on you for knowledge and act upon your insight and direction for important decisions based on a strong bond and the faith they have in your judgment.
- **In-depth knowledge:** The level at which you can speak about a topic of passion or you're viewed as a subject matter expert based on years of experience. Your willingness to share and contribute to discussions, as well as your ability to solve problems and develop solutions, is a constant reminder of your level of in-depth knowledge.
- **Industry expertise:** How involved are you in your industry as a speaker, content provider, association leader,and so on? It's how your peers view your expertise, and the level at which they recognize you're a highly active and participating party, who takes the time to educate and lead others.
- **Intense motivation:** Motivation comes in all shapes and sizes and is truly a personal rating. Motivation is the energy you have at the start of the day, how much you feel you can accomplish throughout the day, and how you drive yourself to achieve more each day to reach greater levels of success.
- **Pure passion:** Passion comes from the heart and is not something that's easy to rate. It's a compelling feeling or emotion, and you can see true signs of passion from people who tirelessly strive to reach

their goals every day. From those who write their yearly New Year's resolutions to the folks who keep To Do lists, passion translates into the challenges you tackle and the goals you reach on a daily basis.

- **Winning attitude:** The power of positive thinking is contagious. Are you a glass half-full or half-empty type of person? A winning attitude means you can find the bright spot or silver lining in any situation, and you move through any circumstances with a positive attitude, even if there are hard lessons to learn.
- **Giving spirit:** When you truly connect with peers to the point in which influence is not just simply sharing a statement, article, or common interest, this critical point is defined by a characteristic called the Give Factor. You can naturally increase your level of giving as the relationships grow and move toward trusted confidant.

Avoiding What Influence Is NOT

At times, it also helps to look at what influence is NOT. Because of the many different viewpoints regarding influence, and because influence is difficult to define, following is an opposite approach to discuss what influence is not. Influence is NOT:

- Solely an algorithm that captures a score; influence is about your peers and the valued experiences you share with them.
- A measure of your ego; it is, however, a measure of trust within your community or network of peers.
- A right; it's a privilege, and as quickly as it's awarded to a person, it can be taken away.
- Control or authority over a peer's behavior; yet influence, depending on the level, can certainly steer or guide behavior.
- Just about the numbers and can't be completely defined by a metric; you can, however, rely on scores for reach, resonance, relevance, impact, and so on. But remember there are personal ways that you affect people, and a number or score may not capture the meaning of the influence on a personal level.
- A popularity contest; popularity is demonstrated with large numbers of followers and friends. For influencers, the numbers range from one end of the spectrum to the other; it's not the quantity but the quality of your interactions.

- A one-time award or something that you can sustain without constant maintenance. Influencers must continue to captivate their communities and grow strong relationships with their peers.
- The power to push messages; you have to keep listening to provide valuable information to your community.
- Static; it can change every day.
- Made up of just one characteristic; it's made up of many.
- Exclusive to social media; people have been influencing their peers for hundreds of years, yet we're hearing more about influence today because of social media.
- The end game; it's only the beginning. It's not what you've done in the past; it's how you continue to grow your relationships in the future.

Influence in 140 Characters or Less

One well-known influencer is Chris Brogan, President of Human Business Works (HBW), speaker and author of Google+ for Business, and co-author of *Trust Agents*. In a Twitter Q&A session, with the #PRStudChat community of PR professionals, educators, and students, Chris offered sage advice about being an influencer. Following is a portion of his Q&A responses:[1]

@PRStudChat Question: How long does it take to become a member of a community, and what steps do you take?

@ChrisBrogan Answer: That's a hard question to answer. How long does it take to fall in love?

@ChrisBrogan Answer: I think the easiest way to answer is that by being helpful and not asking for much back, you win.

@ChrisBrogan Answer: No fewer than 3 months, and that's rushing things.

@PRStudChat Question: What are the characteristics of an influencer?

@ChrisBrogan Answer: Influencers are the types of people who motivate others to take action.

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1 Breakenridge, Deirdre, "Post #PRStudChat PR Influencer Discussion: @ChrisBrogan's Thoughts, PR 2.0 Strategies Blog," www.deirdrebreakenridge.com, February 24, 2011.

@ChrisBrogan Answer: They can use this power for good or evil. There are plenty of negative influencers in the world.

@ChrisBrogan Answer: The best influencers love their community and benefit from that love indirectly. (OPRAH)

@PRStudChat Question: Who are some of the great influencers that have built trust with their communities?

@Chris Brogan Answer: I think @chrisgarrett has a great community. @problogger does, too. They're both heart-first guys.

@ChrisBrogan Answer: @LizStrauss is another great community person. So is @barefoot_exec.

@PRStudChat Question: Do businesses need to have their employees build trust online to be more successful?

@ChrisBrogan Answer: I think some businesses can be successful without working on online trust, but...

@ChrisBrogan Answer: ...companies who work on trust will outperform their competitors, as it's a great lever.

@PRStudChat Question: What is your advice to students and professionals with respect to becoming an influencer?

@ChrisBrogan Answer: Don't focus on becoming an influencer. Focus on building a personal presence and platform that...

@ChrisBrogan Answer: ...helps you help others. The more you help others publicly (without bragging), the better it gets.

@ChrisBrogan Answer: It's really, really important to realize that influence is made up of three things:

@ChrisBrogan Answer: Influence is: 1.) Repetition, 2.) Entertainment, 3.) Value.

@ChrisBrogan Answer: Influence comes from people knowing what you're about (repetition).

@ChrisBrogan Answer: Influence comes from people wanting to listen to you (entertainment).

@ChrisBrogan Answer: Influence comes from giving something important to others (value).

When influence is at its peak, you're helping peers to make important decisions regarding purchases, education, career choices, and emotional and personal advice. There's a big difference between the type of influence causing peers to "like" someone or a brand on Facebook versus the kind of influence that helps you to determine your next career move.

As you develop your new PR practices, you will also be creating, cultivating, and learning to maintain your influence. Your new influence will also propel you to another status called Change Agent status. To take on new practices and tackle social media and PR challenges, change must take place. It must come from within first, and then it filters through to your role in an organization.

Where Are You on the Change Agent Scale?

It's difficult to find an exact statistic on how many people actually fear change, whether personally or professionally. However, based on hundreds of thousands of articles and conversations, you can see how change affects people in various ways, and how they move forward differently to initiate it. You may have to go through several phases of change before you can become a true Change Agent and fully assume your new practices in your organization. Okay, maybe some people just wake up and say, "I'm going to change the world today." But there are also those folks who take baby steps to get to change, and that's just fine, too.

You must create a *Change Scale* for yourself, so you can evaluate where you fall on the scale and where you need to be moving forward. Every PR professional needs to start somewhere to evaluate how to move through different phases of change to reach the top goal, which is Change Agent status. If you are prone to accept change in your personal life, then it may reflect how you handle change in the work environment. As you strive toward becoming a Change Agent you go through the following phases.:

Phase One—Change Thinker and Visualizer

You see the urgency for change and what needs to be done in the organization. You can visualize how a change in process would benefit your team's and your company's communication. You think about the many ways you would institute a change, and you know exactly what the change can accomplish. At the same time, you also evaluate the pros and cons of the change and think about how it can affect the people around you and the existing processes in your department and organization. *At this phase you are not quite ready to talk about the change. However, you know that a transformation is inevitable. Don't stop now...keep visualizing your new practices.*

Phase Two—Change Talker and Motivator

You begin to verbalize how you feel about certain changes within your own department. You express to your confidants (those who are on your team or with whom you work closely) that you think there are better ways to approach a social media challenge or to solve a problem at hand. You communicate a new approach and don't let an opportunity to speak your mind pass you by. *At this phase, you are happy to express your ideas for new practices but not quite putting your good sense into action. However, you rally others to find potential change agents, which means you silently build your Social Media Core Team or Coalition.*

Phase Three—Simple Change Activator

You're ready to take a few baby steps toward implementing change. This is the decision to crawl, walk, and then run, knowing that you may scare a few folks or find naysayers along the way. However, any negative forces that come into play don't stop you from finding smaller ways to show how a new practice can work and to help others visualize the benefits. At this phase, you believe in the transformation and you've done you're homework. *There are others around you who are willing to take baby steps, and you're sharing the vision and strategy behind a plan for change, all for the sake of a better communication. With the help of a few motivated individuals, you can take steps to reach long-term goals.*

Phase Four—Complex Change Activator

You're ready to take on the big communication change challenges, and you know there will be several obstacles in your way as you get rolling with change implementation. However, you're willing to show tremendous urgency for the change, work tirelessly on the vision and strategy, build a strong team to move mountains in your organization, and communicate with everyone about the overall change process. *At this phase, you're not only looking for small wins and solidifying your gains, but also focused on the big change goals. The folks who join your team are hungry for big change, and they're on board with new practices, too.*

Phase Five—The True Change Agent

You have left your fear of change behind. Being a True Change Agent means you're a champion and an influencer. Your research, constant communication, and the continuous change progress you implement show you have a solid track record. Those members of the organization who follow your lead are also strong proponents of change. Together, you institute change as you revamp, reinvent, and innovate communications for your company. *At this phase, you're a True Change Agent—teaching others how to move through the phases of change and rooting* *new processes into the culture—and your colleagues are collaborating and innovating together.*

Believing in change, rallying for support of new practices, and implementing a transformation can be one of the scariest yet rewarding experiences. It all starts with your self-assessment on the *Change Agent Scale* and how you have applied your knowledge and focus to implement change in your organization.

Best Practices of the PR Influencer and Change Agent

Being a PR Influencer and a True Change Agent is not the result of a popularity contest; rather, it's about moving the organization's communications forward by taking a leadership approach. Brian Solis (speaker, author of *The End of Business As Usual*, and Principal of Altimeter Group) sums up PR influence and change with great insight in a brief Q&A.

Q: You have stated in the past how social media requires us "to become the people we want to reach." As a result, PR professionals have adopted this approach and are moving from handlers/facilitators of communications to becoming PR influencers. How do PR pros continue to advance further, using this newfound influence, to raise their profiles in their own organizations, as well as together raising the image of the public relations industry?

A: Business should not view social media as a new way to market at people but instead connect with them to deliver value now and over time. That value is to be defined. Only one aspect is marketing. Everything should be driven by empathy. It's the difference in perspective...between being marketing-driven and market-driven. When I say we must become the people we are trying to reach, I envisioned something greater than just public relations. I optimistically hoped for a more holistic approach. Service, sales, HR, et al. could better engage through a more empathetic approach... one with purpose. While many are adopting this point of view, it is still too nascent to cast a new attitude from consumers. The future of relationships with customers isn't just rooted in empathy, it is equally driven by a mission, vision, and purpose. Yes, businesses operate with all three, but do consumers actually see or feel it? Could they recite it? More important, are your employees behind the movement?

This is a time for revisiting what we do, why it matters, and how we will not only get closer to customers and employees, but also become an invaluable part of their ecosystem. If we can introduce resolution, direction, innovation, and camaraderie into philosophy, processes, and communication, businesses can become influential. As a result, marketing professionals must think like the influencers that they relied upon over the years to take their story to market. This is an era of transparency. Marketing should not take refuge as intermediaries. Nor should they hide in the shadows of their spokespersons. Most important, they should not pin their careers on training others on what to say. Marketing has the ability to become the influencer and that requires rethinking the entire reason why PR or marketing should exist in a social world.

The answer is leadership, not marketing-speak. For this to be realized requires nothing short of a complete overhaul of the marketing and communications methodology. If you wait for the edict to bellow from the top of the organization to you, opportunity and hope will pass you by. You must strive for change. You must fight for new direction. You must be a change agent and build support below, around, and above you to transform your role and the entire course of the business toward relevance.

Q: Do you see PR working more cohesively with marketing, advertising, web, and customer service? Where do the areas compliment and overlap one another? Through PR's involvement in social media and working with other areas of the company, will it be seen as a more strategic function rather than a tactical part of a communications program?

A: PR, marketing, advertising, web, and customer service are fiefdoms within the organization now and are driven by a strong sense of self-preservation and ego. Each is governed by processes, hierarchies, rewards systems, and a micro culture that creates walls and obstacle between other divisions. Change agents or politicians for evolution must champion support with each division, as they're each now responsible for public relations. Customer service, sales, and HR face the public. Their words and actions can equally reverberate throughout new media channels and negatively or positively affect reputation or behavior.

Traditional PR is still necessary. It serves a purpose. Getting someone to see and do things differently may be asking for too much. I do see the emergence of an influence department, however. It's more than just a name, though. It's a way of business.

Become influential within the organization to empower other departments and functions to become connected...to deliver value that's unique to their role. At the same time, this influence division will focus on new influencers and advocates to steer word of mouth. Traditional PR tactics will not work here. A hybrid role is necessary. This team will understand the art and science of influence, have the ability to generate compelling content and interactive experiences, understand the dynamics of conversation and metrics, and more important how to report achievements and ROI to each group around them as well as overall management to grow the size and scope of the department.

Q: What advice would you give to PR professionals who want to be true change agents, to move their companies from traditional communication to a media mix that's earned, owned, paid, sponsored, and co-created with their customers?

A: How do you earn media today? It's a serious question. Do you send out a press release to several hundred people and hope for coverage? Do you pitch people relentlessly and hope someone responds? Do you run a presence on Facebook or Twitter and hope for a retweet or acknowledgment about news by hosting conversations? Maybe it's all of the above. But what's missing from these scenarios are the conversations, posts, videos, and other forms of media generated by influencers and everyday people because they're compelled to do so. What do I mean by compelled to do so? People will share what they love or what they dislike. What if you could steer that activity? What if you could design experiences that were remarkable AND shareable?

That's not only influence; it's architecting influence complete with experiences and outcomes. That's not earned media as we know it. That's co-created media, and that's what makes this genre of public relations so incredible. It's one of the reasons I developed the Brandsphere with JESS3 (www.theconversationsprism.com). I wanted to demonstrate that this opportunity before us is far greater than just P.O.E.M. (Paid, Owned, and Earned Media). The philosophy behind new media defies current processes and tools. And that's OK. We have to change how we think about media and how it benefits us. Without engagement or design, how will any media work to our advantage?

PR Influencer and Change Agent Check List

✓ Realize through all the experiences you share, it's your peers who dictate how each new practice is shaped, and how you share, collaborate, innovate, and build stronger bonds with them.

✓ Understand that influence may be viewed as an algorithm capturing reach, resonance, relevance, impact, clout, and so on, but there are also several personal characteristics that come into play with a person's influence.

✓ Begin the journey to influence by moving away from the numbers at first and focusing on the characteristics to "create" an influencer.

✓ Cultivate and consistently demonstrate the following qualities: trust, in-depth knowledge, industry expertise, intense motivation, pure passion, a winning attitude, and a giving spirit.

✓ Define what influence is not to visualize the opportunities to be a better influencer to your peers.

✓ Let your new influence propel you to a greater status referred to as the True Change Agent.

✓ Determine where you are on the Change Agent Scale and if you are a Change Thinker and Visualizer, a Change Talker and Motivator, a Simple Change Activator, a Complex Change Activator, or if you've reached the True Change Agent status.

✓ Believe in change, rally for support, and implement the transformation in the form of new PR practices.

10

The Future of PR and Social Media

Where do you go from here? Eight new practices for the PR professional is only just the beginning. When social media met public relations, communication techniques advanced, additional practices surfaced, and your roles and responsibilities changed and grew in importance. You cannot control communication. You can only guide and shape experiences, which require a flexible and open frame of reference, and the need to embrace knowledge, skills, and the practices that ready you for new and exciting challenges. "Like a disease, social media proliferation will leave companies crippled," states an Altimeter Group Report titled, "A Strategy for Managing Social Media Proliferation," which discusses how companies must follow pragmatic steps to manage public conversations and a multitude of brand touch points through social media participation.[1] As a communications professional, you must be a proactive and strategic part of the pragmatic approach and the process.

A long time ago, companies never actually had control of their brand communications. Even when they thought they did, in the years pre-Internet, consumers were talking. What was once considered the water cooler chat conversations at break time, or even "private" talks between friends in the lunchroom, have now turned into enormous, connected, human-sharing sessions in a network of peers, with "no holds barred." People prefer information from the people they trust. They love to share their positive experiences and take the negative experiences right up the chain of command to the CEO of the company...because they can. Welcome to your future.

There's no shortage of PR and Social Media predictions. Change is the new constant. The PR predictions in the years to come are based on consumer behavior and the technology that facilitates how people want

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1 Owyang, Jeremiah, "A Strategy for Managing Social Media Proliferation," Altimeter Group, January 5, 2012.

to be entertained, educated, informed, recognized, and connected to others who impart similar passions. Of course, technology improves with every year to make consumers feel even more a part of their connected worlds. They're joining a much bigger movement, and so are you. Communication is expanding in your human networks and keeping you more closely connected and even busier on a daily basis.

At the Mashable Media Summit, Founder and CEO Pete Cashmore discussed what was on the horizon for consumers in the years ahead, both inspiring and overwhelming. As consumer behavior and culture changes, media has to be ready to capture individual preferences and deliver news, information, entertainment, and so on in a customized and more personalized fashion. By the nature of our profession, we have to stay close to media and know how news, information, and entertainment are consumed.[2]

Whether it's a complete touch experience through a Kindle, Nook, iPad, or smartphone, or a family sitting in the highly connected living room and experiencing Google TV, connecting their online and their offline TV worlds, what consumers experience and how they share will always be at the forefront of communications—at the forefront of our practices. The communication professional's job is to capture attention through meaningful experiences (no more mass messaging) and for company messages to reach the public and be considered highly relevant. Communication, and the technology that facilitates the interactions, must resonate as a valuable part of the lives of the people your brands serve.

Now for some refreshing news: PR and social media have the attention of the C-Suite. Studies reveal executives are realizing the importance of public relations. A study by MWW and PRSA released in December 2011 found, "97% of business leaders surveyed think CEOs themselves should understand the role of corporate reputation management." The study also discussed how approximately 98% of business leaders realize the importance of corporate reputation management and having more seasoned communications professionals responsible for protecting the company's credibility.[3] If you have senior leadership's

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[2] Buck, Stephanie, "Eight Digital Trends Shaping the Future of Media," Mashable, www.mashable.com, November 9, 2011.

[3] *PRNews*, "C-Level Execs Recognize Public Relations' Importance," prnewsonline.com, January 3, 2012.

attention, then it's time to take the next steps to educate, build, and deliver impact based on the new practices.

Public Relations is being redefined by organizations including PRSA, the Institute for Public Relations, the International Association of Business Communicators, and the National Black Public Relations Society, which is a further indication of how social media and its growing proliferation has changed what we do.[4] Social media is reinventing and propelling the public relations industry forward, as well as creating awareness about the greater need for PR education on a higher level. For this reason, organizations and professionals are lobbying for PR courses to be included in Masters in Business (MBA) programs at colleges and universities across the country. We're starting to raise the bar, which means we have to put our new practices to use personally, as well as how we approach PR in our own organizations.

As PR rises to new heights of awareness, and the C-Suite visualizes valuable outcomes, it is up to PR professionals to help carry the value forward. At the same time, internally, senior-level executives are learning how social media can answer their questions and build a stronger organization. A *Forbes* article discussed how CEOs become frustrated when they need quick answers and they don't always want to rely on their own expertise. A common "mumble" mentioned in the article is, "Darn, I'm positive someone in our company knows how to answer this." The article goes on to say how enterprise software creates the communication connections CEOs and other leaders often need to get their answers quickly and efficiently. With social media and PR, there are no more grumblings about not being able to find smart solutions; you have a team connected and ready to share from the local to a global level.[5]

If CEOs realize social media and PR is better for internal communication, then you can also steer them to the realization that this powerful combination can serve many other important business functions. This is your opportunity to begin planting the seeds of strategic communication and employing your new PR practices. Social media, like any other type of communication, is planned and requires resources to monitor and measure, develop policies and training, protect reputation and mitigate crisis risk, introduce better technology usage for increased productivity, and analyze how to create stronger relationships with target audiences. Communication

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[4] Elliott, Stuart, "Redefining Public Relations in the Age of Social Media," *The New York Times*, www.nytimes.com, November 20, 2011.

[5] Savitz, Eric, "Social Media for the Enterprise: A CEO's Best Friend," Forbes.com, January 2, 2012.

practices, which result in case studies of exceptional public communication, building the brand's credibility, delivering information based on the consumer preference, and truly understanding how to personalize and customize media experiences, usually starts from the inside out.

It's your job to not only plant the seeds, but also to help create the communications infrastructure and grow the roots to form a collaborative company culture, long after you've moved on or retired. Three simple words "Public Relations Expanded" is the greatest opportunity of your time. When social media became a part of your PR world, you had one choice: to open your frame of reference to learn and embrace new communications practices, as well as the knowledge and skills that came with the territory. You did not have the option to step back and say, "This is just a trend...I don't really have to dig in."

Because you're reading this book, it's fairly safe to assume you see how PR has expanded and how the new practices apply to you. Of course, social media adaptation is different for everyone. Crawl. Walk. Run. It starts with your own passion and how much you experience social media communications on your own time. Then, when you feel you're championing your personal approach, making connections, and sharing valuable experiences with your peers, you know you're ready to take social media and PR into the organization and tackle communications challenges there.

A major point to always remember: You're not alone. There are champions around you at every corner, whether you know these people personally or they are new acquaintances. Social media is about like-minded peers, and they congregate everywhere. No matter how large or small the organization, there are others who are out there connecting, sharing, and using social media with passion. Jay Baer summed it up nicely in his interview in Chapter 4, "New Practice #4: The Communications (COMMS) Organizer." He said social media starts with people who are not necessarily the executives in the company. It's not about a title and a person's position. That's not why someone should "own" social media. On the contrary, it's about the people who just naturally want to participate and love to experiment. These colleagues are actively joining in conversations and using new media, and they just "get it." When you discover other champions, together you can lead the charge and build the team that plans and strategizes. As you start implementing new and better practices, you're influencing others and also moving toward your Change Agent status.

Being a part of the social media and PR movement starts with you. You must first visualize where you are with social media and your own participation. Ten years ago, many PR goals focused on being the handlers and facilitators of communications. Perhaps your success was defined as working with third parties, such as the media, for positive endorsements to raise the image of your company, or even your own professional brand. However, the goals of the PR 2.0 champion are different. These goals require professionals to climb a new ladder to building relationships directly via new media.

When Forrester released its Technographics Ladder, it was a call for PR professionals to view the average consumer's social media behavior against their own. The Technographics Ladder represents how the average consumer participates in social media by moving up the ladder through distinct levels of participation (from the bottom rung up to the top), including their participation as Inactives, Spectators, Joiners, Collectors, Critics, Conversationalists, and Creators.[6] It's important to note where you are on the ladder and then figure out your own goals to reach the top. It's the steps from Inactive to Creator that prepare you to take your social media knowledge and skills into your own organization. How do you advise the C-Suite about the strategic direction of PR and social media? You need a strong grasp of social media and how the average consumer collaborates, shares, and innovates. If you don't roll up your sleeves and get involved in social media, how do you instruct others?

Of course, taking social media into the organization is a process, which requires time and a clear path to move through the steps to integrate it with not only PR, but also with marketing, as well as other areas in the company (that is, Sales, HR, Legal, IT, and Customer Service). As a communications professional, like your peers, you start with little knowledge of social media, and you're solely practicing in a traditional communications world. However, as you step it up a level, you begin to take a Hybrid Professional approach to communications because you begin practicing traditional communications where it makes sense and also supplementing with social media in web communities to reach different target audiences.

Moving up another notch, the Hybrid Professional becomes skilled in areas you weren't familiar with before, including web marketing, analytics, video, SEO, and so on. Now you're speaking a new language and can work with other marketing and digital professionals in the company. At this point,

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[6] Bernoff, Josh, "Social Technographics: Conversationalists Get Onto the Ladder," Forrester, www.forrester.typepad.com, January 19, 2010.

you have raised the bar, and you're working with other departments too, feeling more integrated with your communications efforts. When Public Relations takes the Hybrid Approach, both in traditional and new media, and also moves outside of the PR silo, you touch more areas of the business. At this point, by the nature of your own collaborative connections, you are involved strategically in communications across the company. Now, you can sit at the strategy table with the senior-level executives (see diagram of the Hybrid Approach in Figure 10.1). When you climb to the highest level, as a Communications Strategist, you are also introducing and implementing your new PR practices.

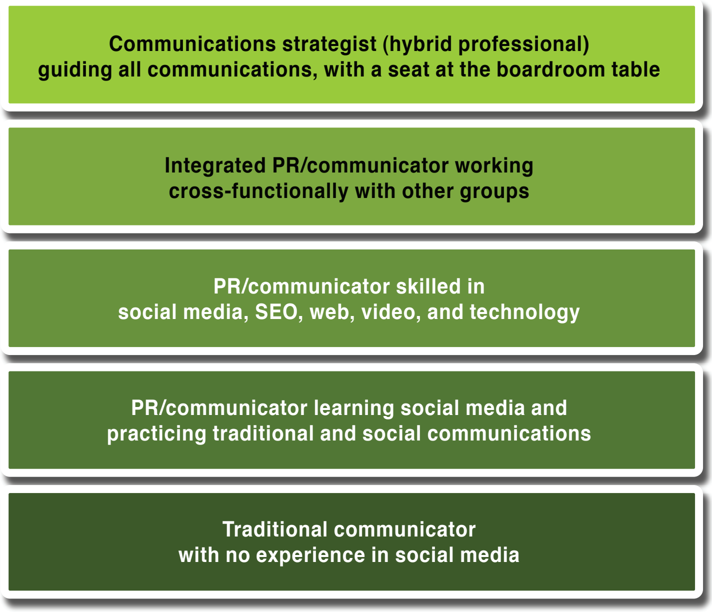

Figure 10.1 Your Climb to the Hybrid Professional

Social Media and Public Relations presents eight new practices for you to learn and embrace first. You also must be a Hybrid Professional to rally others around you to adapt. Your climb can start slowly with one, two, or even three practices. If you're very ambitious, then you choose to work on all eight practices at once, because you're the Complex Change Activator or the True Change Agent. In this case, the support you need is in place to forge ahead with new communications infrastructure. With each and every practice, you're creating new processes, shaping company culture, building influence, and focusing on PR and social media strategy, which result in positive outcomes for the long term.

Social media and public relations cannot be static when technology evolves and changes communications everyday. Changing methods of communication are recognized when the CEO of Best Buy, Brian Dunn, takes to his blog, "D Corner," to address negative press.[7] If you were still practicing in a completely traditional communications world, then Dunn's public address regarding company criticism would not have been a part of your strategy. You wouldn't have advised your CEO on the public blog address, a transparent and human approach, with the speed to face timely issues. Perhaps, you would have been focused on the traditional CEO's statement, rather than discussing some controversy in the public forum. Another example is the Dominos Pizza debacle. If this were your company, and you weren't a Pre-Crisis Doctor (PR Practice #5), then how would you know to match the appropriate message with the appropriate medium? YouTube video crisis calls for YouTube video response. Your PR practices must reflect how communications unites with technology.

The information presented in each chapter is not tactical, although that doesn't mean you won't be involved in the tactical implementation of your communications programs. The eight new practices are a way for you to plan, build, and create good communication practices on the inside first and then take your own sharing, collaboration, and innovation to shape better communication experiences externally with the public. Of course, as a part of your climb to expand PR and social media, you need to quickly verbalize the strategy behind each practice. Solid purpose and strategy can lead to better understanding and support.

Today, you see how important it is to communicate clearly the value of public relation to business executives and to the public. In a similar fashion, you must communicate the value of your new strategic social media and PR practices to rally support for greater initiatives moving forward. These are the efforts to benefit employees internally, as well as the organization's stakeholders. The following sections show why each of your new practices is strategic and deserves C-Suite attention. This is your 30-second elevator pitch.

[7] Nixon, Tom, "Best Buy CEO Responds to Bad Press Via Blog: Good or Bad Move?," Ragan.com, January 10, 2012.

Practice #1: The PR Policymaker

The PR Policymaker spearheads and participates on a team of social media visionaries and strategists in the organization. As a member of the Social Media Core Team, the practice includes conducting social media audits, establishing policy goals and objectives, guiding the team policy development process, communicating policies to employees, and measuring policy compliance. The PR Policymaker creates and maintains the social media policy to protect the reputations and the privacy of the company, its employees, and the public.

Practice #2: The Internal Collaboration Generator

The Internal Collaboration Generator realizes good communication starts on the inside of the organization. Beginning with the communications department, the new practice focuses on a strategy to get employees sharing and innovating for more productive programs. The Internal Collaboration Generator audits the sharing needs by researching current communication behavior, answering "sharing questions," and determining department(s) sharing needs, from simple collaboration to tapping into existing enterprisewide sharing practices. The Internal Collaboration Generator develops the strategy to inform and educate employees on new sharing processes.

Practice #3: The PR Technology (Tech) Tester

Technology enhances the communications experience. Using technology fosters better communications programs internally, as well as externally with the public. The PR Tech Tester creates a strategic program to identify, evaluate, and test technology for greater collaboration and to build stronger relationships. From evaluating social media monitoring resources and identifying influence tools to enhanced news release sharing and collaborative platforms, the PR Tech Tester is focused on finding the best technology for more communications impact with increased learning and business outcomes.

Practice #4: The Communications (COMMS) Organizer

The Communications (COMMS) Organizer develops a more structured and productive approach to internal communications and collaboration in departments and between departments in the organization. Taking a strategic approach to collaboration requires a plan that gathers customer intelligence and routes it to the appropriate professionals in the company, develops content curation by taking a two-prong approach, creates departmental as well as universal employee content-sharing processes, maps to a better system to host social media account information, and finally, creates innovative ways to educate employees on new procedures.

Practice #5: The Pre-Crisis Doctor

The Pre-Crisis Doctor plans for all levels of crisis escalation. The practice includes developing a system to identify key members of the company who are involved in social crisis, building the shell of messaging for different social media channels (from Facebook and Twitter to Google+ and YouTube), testing technology tools when the conversations are still positive, building a detailed Comment Response Chart based on gathering conversation intelligence, and a listen/evaluate/respond approach, integrating the social crisis plan with other departmental plans, identifying key bloggers and media for support during phases of crisis escalation, and making sure measurement is set (with benchmarks) and ready to capture negative comments at all times.

Practice #6: The Relationship Analyzer

The Relationship Analyzer takes the practice of relationship building several layers deep to increase brand loyalty and advocacy. The practice requires developing extensive audience profiles, analyzing the growth of relationships based on culture, sharing habits, and social connections, defining the nature of the relationship and how to move it to new levels, using technology to visualize the depth of the relationship and to further grow its potential, and to use social media to create enhanced experiences.

Practice #7: The Reputation Task Force Member

With reputation on the CEO's mind, the Reputation Task Force Member must focus on a plan to build the human face of the company and teach the brand's core values. The practice also requires a program to capture sentiment monitoring and measurement to reveal positive, neutral, and negative sentiment at all times. Members of the task force are the relentless auditors who know their job is a combination of ethics enforcer, brand police, and the "social voice." The goal of every Task Force Member is to proactively support the brand reputation through social media and to grow the task force from the communications department to every department and employee in the company.

Practice #8: The Master of the Metrics

Strategy requires measurement. The Master of the Metrics is focused on a program that offers executives the measures they need based on business outcomes versus what departments require to see social media progress. The practice includes a strategic view of metrics, breaking them down from the simple to complex engagement. The Master of the Metrics creates measurable social media objectives (benchmarked over time) to clearly communicate ROI for the executives as well as sets up a six-step metrics program for departments to track. At the same time, it's necessary to differentiate between high-level versus low-level metrics on various platforms.

Your new practices can ready you for business communications now—and in the future. Learning to adapt to the highly connected customers' world starts with your own efforts, moves into your communications department, and then to every department or person across the company to work congruously. Businesses today are required to deliver messages, stories, and experiences to people who have strong preferences, and to those who want only relevant information from trusted sources. Your eight new practices were developed to help you prepare for the further proliferation of social media and communication changes, and the resulting affects on a business. As a result, the strategies you devise can lead to higher levels of engagement and brand impact, and valuable outcomes through your communication touch points.

The PR professional's use of social media requires a new mindset, as well as knowledge and skills outside of the PR silo. However, you can also apply many of the skills and abilities you already possess. The PR person is a natural liaison, educator, writer, planner, and critical thinker. When combined with competence in using technology, relationship building, flexibility, and adaptability, you are poised for recognition. Companies need people who look at social media and move beyond themselves and the PR silos erected over the years. You need to cross borders because with social media, the boundaries have changed. Social media and new PR practices, and the union of communications and technology, open up a world of education, collaboration, and innovation. The results are advocacy, loyalty, good will, and public confidence, and ultimately greater relationships from the local and regional level to national and global alliances. Don't stop with the eight new practices; keep climbing to new PR heights. When social media meets public relations, eight practices are only the beginning. Look inward. Go upward. Then reach outward. The future of PR and communications—your future—depends upon it.

A

The Social Media Strategy Wheel

I developed and introduced the Social Media Strategy Wheel in 2009. It's been updated in this book to help PR and communications professionals visualize the core components of social media strategy and planning. To effectively use the wheel, you must work from the inside circle out. With any communications program, you begin with the audit/discovery and research phase to evaluate resources and techniques that work in earlier initiatives. The information you uncover during the discovery phase can help you to create a stronger program, with goals and objectives, appropriate target audiences, and the budgetary requirements necessary to launch your effort.

The main sections of the wheel (Tracking & Monitoring, Channel/Distribution, Communications/Content, Engagement, and Measurement) are the areas to help you formalize your strategies and tactics to successfully reach your goals. It's critical to realize that all strategies and tactics must map back to your overall objectives. Social media requires you to think differently about your planning and strategy because you are joining communications with technology and always keeping in mind the behavioral preferences of your target audiences.

Following are the questions you must ask for each major area of strategy development represented on the wheel:

- **Tracking & Monitoring Strategy:** What are the key topics and relevant information important to my audience? Setting up a monitoring and tracking strategy enables you to uncover a better approach to storytelling and participating with groups in social media communities.
- **Distribution/Channel Strategy:** Where does my audience participate—on what kinds of networks and what platforms? Understanding the way groups participate, collaborate, and share in particular social communities can help you to create a channel and distribution strategy for greater opportunities to engage.

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- **Communications/Content Optimization Strategy:** What are the critical issues of the influencers and brand advocates? What content excites them and how do they like to share content (in what formats)? A communications and content strategy helps you to develop and optimize your content and messaging for maximum impact.
- **Engagement Strategy:** What are the best ways to engage with an audience or what actions do you want them to take? Do you want them to learn about the brand, provide endorsements, create their own content, share your information, or develop a mutually reciprocal or strategic relationship? When you determine your engagement strategy, you can see clearly how certain types of engagement lead to higher-level adoption and business outcomes versus lower-level participation in communities.
- **Measurement Strategy:** What measurement strategy needs to be put in place to track/benchmark program success? What are the metrics that map back to higher-level goals and objectives? The

measurement strategy enables you to show the value of the PR/ Social Media program by tracking metrics that reveal leads, sales, registrations, learning, strategic relationships, reputation management, and thought leadership.

The Social Media Strategy Wheel houses all the critical components of your social media plan. You must develop your strategies first, by going through each section of the wheel, before you roll out with communications tactics to reach target audiences through the various social media channels.

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