Social Marketing Playbook: Planning & Measuring Campaigns
If a tree falls in the forest and no one is around to hear it, does it make a sound? If we agree to measure sound as a human experience, then the answer is ‘no’. The same can be said of social marketing campaigns.

If you’re not being heard by your audience, what hope do you have of achieving your objectives?

The most fundamental component of a successful social marketing campaign is the reaction of its target audience. Failing to make use of — or drastically underutilizing — rich data that can be gleaned from today’s densely populated social media landscape is a significant missed opportunity.

In this playbook we’ll take you through several must know steps and processes for making sure that you develop marketing campaigns that have social media data at their core. We’ll go over best practices for utilizing social data that can be used in the planning, measuring, and follow up stages of your campaigns.
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Today, much of the world’s population is using social media as a means of communication and entertainment.

This vast and rapidly growing audience is gathered across a handful of digital spaces, the proverbial forest, and your ability to reach them depends entirely on your social media strategy.

In **2015**, an estimated **179.7 million people** used a social network, and the number of worldwide social media users is projected to grow to **2.5 billion** by **2018** (eMarketer).

According to a **2016** Pew Survey, **65% of adults** used at least one social networking site, and for adults aged 18 to 29, the figure rose to **90%**.
THERE ARE MANY BENEFITS TO A SOCIAL MEDIA CAMPAIGN:

- Better **brand recognition** among a wider audience, with social sharing providing opportunities for **organic audience growth**
- Improved **customer insight** on a platform where the audience provides its point-of-view through comments and other **interactive behavior**
- Improved **brand loyalty** with communication techniques tailored to the **desired audience**
- Better **SEO, higher conversion rates, and scalable marketing costs**
- Larger, more diverse and **wide-reaching communities**
- Opportunities to expand **CSR efforts** to benefit harder-to-reach recipients
- Reaching **new groups of target audiences** and amplifying social content through paid social media
- Driving leads to **content marketing**
The influence of social media on customers and potential customers is substantial, widely demonstrated, and growing rapidly.

It is surpassing traditional media’s impact on purchase decisions, brand loyalty and customer service: The Drum reports that...

According to AdAge, consumers’ social media habits now play almost as big a role in purchasing decisions as television.

A strong social media strategy is becoming fundamental for agencies and marketers, with the share of marketing budgets spent on social media expected to more than double over the next five years, from 11 percent today to 24 percent by 2020 (CMO Survey).

**Facebook now influences 52% of consumers’ online and offline purchases, up from 36% in 2014.**

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Over 66% of marketers currently report lead generation benefits from as little as 6 hours spent per week with social media.

In addition, more than half with at least two years invested in social media marketing report a gain of new partnerships and improved sales. Nevertheless, social media is still often regarded as a “checkbox” item assigned to junior staff lacking experience in developing effective strategies.

So what are the first steps to building a social media strategy and campaigns to execute that strategy?
First, decide what you want your social media campaign to accomplish.

Who do you want to reach?
What do you want them to do?
Where and When should they do it?
Why?
The backbone of any social media campaign is SMART goals.

An “act now, think later,” approach to incorporating social into existing marketing campaigns can work against the marketer or agency experimenting with social for the first time. It is less effective than an approach that takes into account the medium’s strengths and weaknesses, while also running the risk of leaving key stakeholders without benchmarks against which to measure success or failure.
Before laying the groundwork for any social campaign, social marketers should ask themselves a few key questions:

1. What are the organization’s business goals for the month/quarter/year?

2. What messages, content and campaigns have been created in the last six months to a year? Which ones struggled? Which ones were successful? Why?

3. Which audiences are marketing and sales currently targeting?

4. What are our key performance indicators (KPIs)? Brand awareness? Perception change? Lead generation? A particular action - clicks, engagement, requests for outreach or trials?

5. What does success look like to the client?

6. What does success look like to internal stakeholders, such as sales or the executive leadership team?

7. How are competitors measuring their success?
Many marketers starting out with social marketing make the same common mistake: failing to see the forest for the trees.

They focus on objectives — measurable, specific targets — without applying those to larger business goals.

LET’S CONSIDER A PRACTICAL EXAMPLE.

Pretend you’re a small consumer packaged goods (CPG) company looking to introduce a new seasonal product. The field team has done their work to set up product demos at grocery stores, aisle displays, college campus giveaways and flyers at shopping malls. It’s now the digital marketing team’s job to extend the product launch to social media.
It can be tempting to opt for the low-hanging-fruit such as shares, likes, and comments without considering the bigger picture. However, doing so opens up potential for a disconnect to develop between marketing departments. Instead, consider focusing on:

- **Overarching brand strategy**: Are you looking to introduce the brand to new customers or to get new customers interested in the product?
- **Executive point of view**: What does success look like to the executive team — better sales or greater brand awareness?
- **Tactics to support strategies**: What tactics are approved — or already proven effective — to introduce the products to new customers? Trials? Giveaways?
- **Desired action**: What do you want your audience to do on social? Tell their friends about you? Follow a call-to-action? Click through to a partner site?

Once you’ve considered the above, you’ll be prepared to define your goals and objectives.

Try to keep goals and objectives short — too many can cloud the output, targeting, and reporting of a campaign and distract from the results that matter. *Three to five* is the sweet spot.
ENSURE THAT OBJECTIVES ARE MEASURABLE

Key stakeholders will determine the campaign’s success by its ability to reach quantifiable goals.

MAKE SURE TO FIND A BALANCE BETWEEN THE ASPIRATIONAL AND THE ATTAINABLE

You should choose objectives that are attainable, so you don’t set up yourself for failure, but ones that remain aspirational enough to push strategies.

SAMPLE OBJECTIVES AND GOALS FOR OUR CPG EXAMPLE:

<table>
<thead>
<tr>
<th>OBJECTIVES</th>
<th>GOALS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase Awareness of New Product Among Existing Customers</td>
<td>• 500 free snack sign-ups from existing follower base</td>
</tr>
<tr>
<td></td>
<td>• 1,000 social shares from existing follower base of new product announcement</td>
</tr>
<tr>
<td>Increase Brand Awareness Among New Customers</td>
<td>• 1,500 new social followers in target audience groups</td>
</tr>
<tr>
<td></td>
<td>• Increase share of voice (SOV) in target keywords by 3%</td>
</tr>
</tbody>
</table>
Brands are crowding social media with an enormous amount of content.

The landscape is saturated, and certain social networking platforms now deliberately deprioritize brand content in favor of posts by friends and news organizations. In other words, your social campaign might be the new Oreo Daily Twist ... and still need a boost from paid support.

Faced with this new reality, the major social media platforms are now best thought of as advertising platforms. This may represent a shift for brands — but a beneficial one. Advertising through social channels allows brands to cut through the clutter and reach consumers more strategically. Social advertising also allows for an unprecedented amount of focus and targeting, given how much users choose to share about themselves on their social channels.
By definition, organic posts on social media are untargeted – they’re seen by whoever follows a particular user, and those eyeballs don’t necessarily belong to your most valuable audience.

Investing in high-quality content isn’t cheap and with paid support, you are able to better target your audience—based on criteria that matters to you.

This ensures that your content isn’t going to waste and is being seen by the right people for your campaign goals.
Paid promotion not only ensures you’re reaching the right audience with your content; it provides you with a wealth of information on your campaign’s performance — information not available from organic posts.

Campaigns can be measured and optimized based on traffic to site on a cost-per-click basis, engagement on platform, completion of video, consumption, sharing, or lead generation/acquisition and sales. A smart paid program helps you understand the market price for the results you want, and lets you optimize your content program to deliver stronger results within your budget.

It is also the most impactful method of advertising that exists — In 2016, 74% of marketers have reported using social ads — with 59% saying they’re effective, compared to print/offline promotion (used by 65% of surveyed marketers, but with only 46% reported effectiveness) (Social Media Examiner).
It’s safe to say that paid support should now be a part of nearly every social campaign strategy. However, the following types of campaigns may benefit from it the most:

- **Resource intensive content**: If a brand has invested in high-value content — like videos, white papers, or microsites — that value should be extended as far as possible. Remember the tree falling in the woods with no one to hear it? That’s your pricey content without paid support.

- **Increasing brand awareness**: There is no more effective way of increasing the number of eyes on your brand than paying for those impressions with a targeted campaign.

- **Extending the life of earned media stories**: If a brand has landed an on-message, top-tier media hit, the publication will promote it — for a day. But that effort in pitching, messaging and prepping shouldn’t die in a news cycle, and with paid support on social — it won’t.

- **Targeting a specific audience**: Paid support can also allow you to promote directly to one group rather than the entire web – particularly useful for location-based targeting or campaigns involving a sensitive issue or audience.
It’s not enough to have expert knowledge of the brand you’re promoting to run a successful social media campaign.

You need to understand the larger industry landscape, the interests and activities of target audiences and current events.

COMPETITORS

First, research the campaigns your brand’s competitors have recently run and learn how they’ve released similar products. Most often, competitive research should include:

- Evaluating which messages garner the most engagement (both positive and negative)
- Examining their share of voice within the industry
- Evaluating the differences between their brand messaging and your own
- Looking at the way competitors are covered in the media — are there reporters or outlets who would be interested in your announcements as well?
AUDIENCE

Next, define your desired audience: what are the strongest demographics to target based on your product or announcement, taking age and audience size into consideration?

Once you understand your audience and define their habits, ask the following questions: what platforms and hashtags do they use? What conversations do they have on which topics? What kind of content motivates their engagements? What trends do they follow?

This part isn’t easy to do manually—it’s time-consuming and the results are narrower than those captured by tools designed to monitor audience conversations. Tools like Sysomos enable campaign managers to respond to both paid and organic engagements in a single dashboard in real-time. Sysomos can help pull key insights together in the weeks leading up to a campaign.

RELEVANT EVENTS

Finally, explore existing events for a timely tie-in.

Are there upcoming industry events, conferences or tradeshows, pop culture milestones or important holidays to leverage for posts relevant to audiences’ interests? Are there any pertinent announcements being made within your industry you can expand upon and inform? If your audience is speaking to a subject, you should be, too.
You’ve set your goals and objectives. You know what’s going on in the market. You’ve identified the right time, place and message for your audience.

But before you launch, here’s a checklist ensuring you’re ready to go on launch day:

- Check current events before pressing “launch”
- Creative
- Testing
- Tracking Strings
- Billing
- Targeting
- Billing
- News
CREATIVE

• Copy is drafted following each network’s character count requirement.
• Images are created in accordance with dimensions and specifications of each network.
• Material is reviewed and approved at least two business days before launch to ensure there is ample time to set up the campaign.

TESTING

For a successful campaign, especially a brand’s first, test all messages, creative and targeting. Set up test posts with one changed variable on each post to measure effectiveness of one piece of creative or copy versus another.

TRACKING STRINGS

If the campaign leads to particular web assets on your brand’s page, use an analytics system, such as Google Analytics or Adobe Social, to set up tracking strings and measure end-to-end impact on the web destination.

BILLING

If your brand is launching its first paid campaign, many social networks require establishing a line of credit with them first. This means that you will need to set up your billing account up to five business days before launch and you may not be able to spend quickly. Check each social network’s guidelines so you are prepared.
TARGETING

Setting up targeting for paid campaigns can take a long time and reveal surprising facts. It could turn out that your audience isn’t large enough or it will cost more per action than originally estimated. Set up the campaign targeting at least two business days before campaign launch to make any changes necessary to meet overall goals.

CHECK CURRENT EVENTS BEFORE PRESSING “LAUNCH”

In our current climate, news of struggle, tragedy and unexpected occurrences happen every day. For brands, the wrong pre-scheduled social post going live at the wrong time can garner negative publicity and impact the success of a campaign. Before pressing “launch,” check to make sure your campaign isn’t accidentally running alongside a tragic news event and casting a poor light on your brand’s reputation.
Once your campaign is launched, the work isn’t over—in fact, it’s just beginning.

Here are five steps to optimize your campaign while it runs:

1. BE PRESENT

No matter the goals and objectives of your campaign, audiences and user groups engaging with content should be heard and engaged. If your audiences respond to content, acknowledge their responses by “liking” their comments as appropriate, or responding with an on-brand message. Tools like Sysomos and its Paid Social Analytics features enable campaign managers to respond to both paid and organic engagements in a single dashboard in real-time.

2. DON’T ENGAGE WITH TROLLS

If your campaign receives negative feedback, you do not need to respond to everyone. Responding can provoke negativity, no matter how diplomatic your response. A best practice is to only respond to negative commentary that directly goes against your brand values or is factually false about your brand, rather than passive opinions. Also, do not delete negative responses — this will rarely go unnoticed and gives the trolls a valid complaint to air.
3. FOLLOW THE 1% RULE

Social networks vary, as do goals and objectives, but a general rule to follow is to shoot for at least 1% click-through or engagement on posts. As with other forms of marketing — like direct mail — 1% of an audience shows that messages are resonating and that your targeting is accurate.

4. DITCH THE UNSUCCESSFUL

If a message, creative, or target isn’t leading to the results you’re after, stop it in its tracks. Allocate those resources to a more successful post in the campaign — don’t waste budget or audience attention on posts that aren’t working.

5. KEEP IT FRESH

Did you notice a new trend occur during your campaign that you could leverage? Have your results plateaued? Adjust as you go. Create additional graphics, alter your targeting and try new social campaign layouts. Campaigns have a lifespan—it’s the social marketer’s job to make it a long one.
Your budget has run out, your product or announcement has made the rounds and now you have a lot of data for reporting.

But those numbers mean little without context, especially for those who don’t live and breathe social media. How do you tell your key stakeholders what happened?
Below is a report template that keeps information concise, action-focused, provides baselines and will help stakeholders comprehend the relevance and importance of campaign results.

<table>
<thead>
<tr>
<th>Goals &amp; Objectives</th>
<th>Reiterate the goals and objectives originally formulated at the beginning of the campaign to remind readers what you were trying to accomplish.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive Summary</td>
<td>Write this portion last. Look through all other sections and highlight key learnings and success factors tied to goals and objectives. Keep this section to 150 words or less as many readers will only make it this far.</td>
</tr>
<tr>
<td>Who</td>
<td>• <strong>Who</strong>: Who was this campaign targeting?</td>
</tr>
<tr>
<td>What</td>
<td>• <strong>What</strong>: What was the strategic framework for the campaign?</td>
</tr>
<tr>
<td>When</td>
<td>• <strong>When</strong>: What was your campaign timeline?</td>
</tr>
<tr>
<td>Where</td>
<td>• <strong>Where</strong>: Which social networks did this campaign live on?</td>
</tr>
<tr>
<td>Why</td>
<td>• <strong>How</strong>: Here, briefly break down your campaign’s strategy. Include specific variations of content tested, number of posts and diversity of creative.</td>
</tr>
<tr>
<td>How</td>
<td></td>
</tr>
</tbody>
</table>
### Top Performing Creative & Targeting

This section is important for informing future social campaigns, as well as other marketing campaigns. Here, choose 3-5 of the top performing posts and include screenshots with a few bullet points on why they succeeded.

### Key Learnings

No campaign is perfect. Out of the challenges that may have occurred, identify a few in 1-2 sentences, making sure to include:

- What happened?
- Why did it happen?
- What will be done differently in the next campaign?

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**ONCE A REPORT IS COMPLETED, CIRCULATE THE RESULTS TO KEY STAKEHOLDERS (SALES, CUSTOMER SERVICE, ETC.) WHO CAN ACT ON THEM.**

Follow up with departments to ensure the insights from reports are being implemented and used as a lens through which they work. Key learnings are only useful when effectively being put to action.
Helping run a successful brand campaign can uncover insights into customer groups and trends, which can showcase your agency’s capabilities within the creative, digital, paid and traditional PR space. It can ensure that client recommendations are well-researched and exceed competitors’ work.

A solid social campaign will strengthen client relationships as the agency becomes a trusted advisor, generating new business opportunities based on the expertise demonstrated in the campaign.

Using social tools helps you identify the right targets for your message, driving massive lifts in engagement over other targeting methods, and helps develop a specialized agency department of well-resourced experts for use across clients and accounts.

Additionally, it broadens the scope of social media use.
For Marketers

Proven campaign results can lead to additional resources and budget for future social campaigns and build strong relationships with industry influencers, who may then become product advocates and invaluable consultants. Successful campaigns also gather critical insights on competitors and audiences, which can be used by other departments within your company.

Furthermore, understanding your audience landscape and the types of messaging and creative that resonates best with them, helps to inform future marketing plans and content. Once you’ve earned the trust of management and senior staff, you can continue pushing boundaries, exploring new features and functions on social and finding new, exciting ways to entice and converse with your key audiences.

beyond campaign planning, as clients impressed with your social media capabilities will come to you for their other needs, such as visual analytics or social customer relationship management.
The Data is Clear

The world is using social media in overwhelming numbers, and strong social media campaigns have proven impact. When brands skip social media activations—specifically ones with paid support—they do so at their own peril.

And while so many marketers consider the task of running campaigns difficult, tools exist to simplify the process and dramatically optimize the results.

Whether you want to listen to customers, monitor competitor activity, curate user-generated content, or manage your brand’s publishing, the Sysomos platform empowers users to transform social media data into actionable and strategic business opportunities.

A strong social campaign is essential and with the correct tools, it ensures that when your campaign launches, it will make the sound you need.

For more information on what Sysomos can do to help you with planning and measuring your social media campaigns, please visit Sysomos.com/products
10. SOURCES CITED


- Facebook influences over half of shoppers says DigitasLBi’s Connected Commerce report, John McCarthy, The Drum, April 2015.

