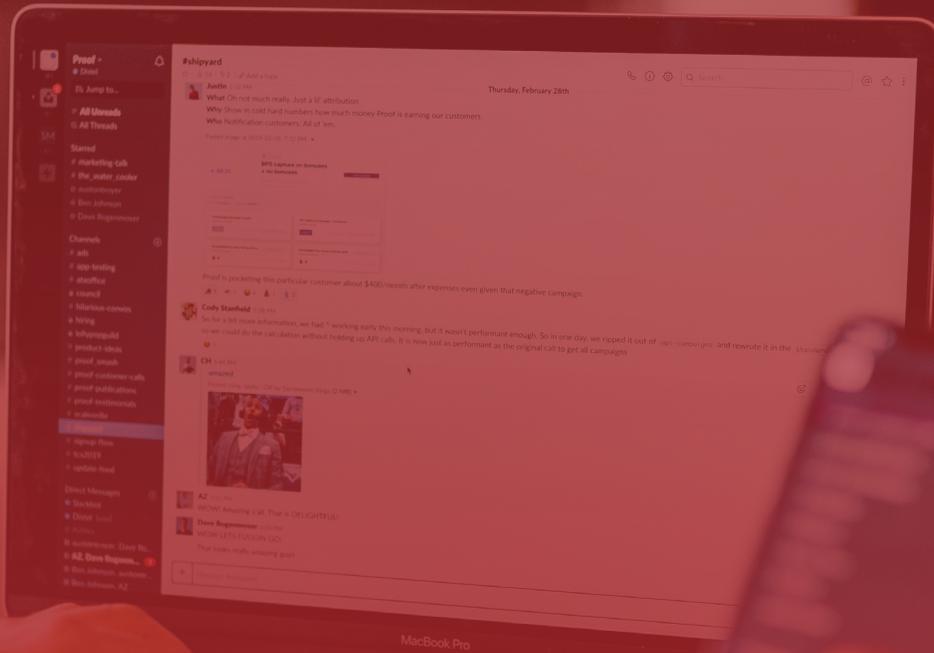


DEMYSTIFYING  
B2B SOCIAL MEDIA STRATEGY:



# PILLARS OF SUCCESS

Trellist®  
MARKETING | TECHNOLOGY



# INTRODUCTION

In business, as in life, you need a plan. And you need the ability to execute on that plan. Yet building a plan can sometimes be daunting. Where to start? How and where do we focus? How detailed do we need to be? What information do we need? Can't we just try a few things out first? These are all common and fair questions our social business experts hear time and time again.

The answers aren't arrived at easily, as every company is different and every organization's supply of resources is finite. But over time, we've found that the 6 Pillars for Success we describe in this Trellist whitepaper will help you build your company's social media playbook and start executing on the road to a best-in-class social media program.



# WHY DOES SOCIAL MEDIA MATTER FOR B2B AND B2B2C COMPANIES?

It's an important opening question. Why should B2B or B2B2C focused companies care about social media when they have so many marketing, communications, and sales options at their disposal? After all, you're not offering up consumer goods, clothes, or adult beverages to the masses. Your business is different.

For starters, social media is no longer confined to our personal lives or only to certain industries or markets. Social media and its impact are everywhere.

Professionals with decision making and buying power are active on social media in a variety of formats. A study by International Data Corporation (IDC) found that 75% of B2B buyers and 84% of C-level or VP-level professionals use social media to make purchasing decisions. So yes, your existing customers and your prospects are out there engaging on social media, potentially evaluating competitor products and services in your market or niche.

Since your existing customers are on social media, they'll expect a certain level of engagement and service from you there. More and more, users are flocking to social media as their first point of entry for a customer service need. And if you're not prepared, but your competitors are, your reputation will suffer. A little work will go a long way here. We'll go into more detail on this shortly.

*(Continued on page 4.)*

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Another important answer to the larger "why" is related to the idea of establishing thought leadership and brand awareness in your space. Social media channels continue to provide new and exciting ways for businesses and brands to showcase and share what they know, what they're working on, and how they're making a difference. When those messages strike a chord with your followers and they share them with their networks, there's immense potential for extended reach, awareness, and engagement with your brand.

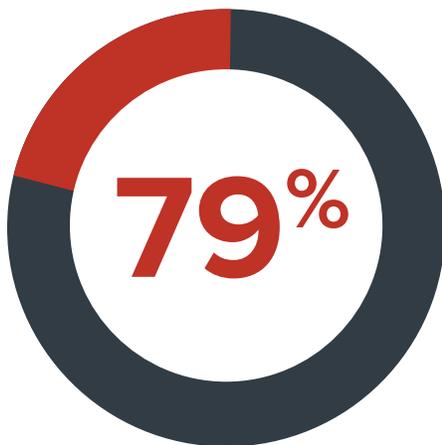
And of course, a good social media strategy can and should assist your sales efforts. In two ways specifically. The first is targeting the right potential customers. Social media networks and their paid ad ecosystems provide you with an opportunity to target users who appeal to you on a number of levels – including industry, position or seniority, interest in topics and products, and much more. This is a truly powerful tool that takes the onus off of your team for audience development and segmentation. And that leads to the second way – social-

assisted online lead generation. Social media has proven its worth in generating interest, driving traffic to owned sites, and compelling prospects to opt in to communications.

These insights begin to uncover the importance – the necessity really – of establishing a documented and ever-evolving playbook for social media across your business.

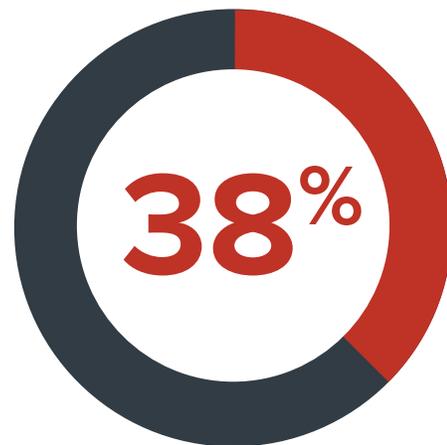
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In a survey of **115 marketing specialists in B2B roles**, Omobono found that...



*Rated social media as the most effective marketing channel.*

**with**



*Noting that if they had extra budget for next year, they would spend it on social media.*

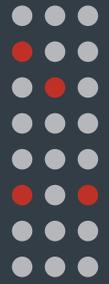
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<https://www.adweek.com/digital/social-media-b2b-works/>



# PILLARS

OF SOCIAL MEDIA SUCCESS



We promised we'd drop these 6 pillars on you – so now that we've laid out some of the groundwork, here they are:

**1**

**DEVELOPING FOUNDATIONS  
& SETTING GOALS**

**2**

**UNDERSTANDING  
YOUR AUDIENCE**

**3**

**ESTABLISHING A BOLD  
CONTENT STRATEGY**

**4**

**ACTIVATING ON THE  
RIGHT CHANNELS**

**5**

**BUILDING COMMUNITY MANAGEMENT  
& CUSTOMER CARE STANDARDS**

**6**

**EMPOWERING EMPLOYEES TO  
BECOME SOCIAL MEDIA ADVOCATES**

We'll break down each one in detail. What we hope you'll see after diving into the details is how each pillar effectively feeds into the next – creating a nearly living organism of social media activity and excellence for your organization where all parts are working together and informing the others. Strategy is always evolving and you will learn a lot as you commit to a program that uses social media to assist your organization's upward trajectory.



# 1 DEVELOPING FOUNDATIONS AND SETTING GOALS

If you're reading this, you're already taking the first step in your strategy. You've decided you want to be better – dare we say you have a desire to be great. That's what it takes to succeed and to stay committed to a winning B2B or B2B2C social media program.

In essence, that's your foundation. Along with a few other things we mentioned in the opening, this is the reason you want to use social media as a key channel for your business.

Other foundations may include:

- Building general positive brand and PR awareness for the company
- Providing useful, relevant and timely content to existing customers – empowering them to purchase with confidence
- Generating prospects for the company's products and services
- Supporting existing customer/partner relationships
- Supplementing events and event marketing throughout the calendar year
- Building a strong employment brand through stories of your company's culture and unique people
- Engaging employees – a company's greatest brand asset – on social media
- Creating an extension of existing customer care and retention activities

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These are the general categories that many of our clients start with and build out their roadmap from there. Once your foundations are established, it's important to set clear goals against each. And that brings KPIs (key performance indicators), also referred to as success metrics, into the conversation.

**Specific KPIs** should be viewed against objectives as indicators of success or need for improvement. Without a perspective on how to measure success, your organization will struggle to show an ROI on social media activity.

To put the idea of KPIs in context, if a foundation or goal of your social media program is building positive brand awareness and PR exposure, metrics you would focus on include:

#### **IMPRESSIONS GENERATED**

*Number of times social media posts appear*

#### **POST REACH AND FREQUENCY**

*Number of people who see social media posts and the number of times they see them*

#### **COMMUNITY/FOLLOWER GROWTH**

*# of followers/change in followers month over month across active social media channels*

#### **SOCIAL SHARE OF VOICE**

*Percentage of social media conversation on any given topic you own versus competitors*

#### **SOCIAL SENTIMENT**

*Measurement of perceived positive, negative, and neutral social media mentions related to your brand/products/services*

#### **ENGAGEMENT**

*# of likes, shares, comments, reactions, clicks, and other critical actions on your social media content*

Likewise, if you're using social media as a tool to generate leads, you would be laser-focused on the following metrics:

- **IMPRESSIONS GENERATED**
- **POST REACH & FREQUENCY**
- **WEBSITE VISITS/PAGE VIEWS**
- **LEADS GENERATED**

From another angle, if you wanted to use social media to help promote your employment brand and generate interest in careers during a time period critical for hiring, you would measure the following against your content:

- **ENGAGEMENT**
- **ENGAGEMENT RATE**
- **APPLICATIONS GENERATED VIA SOCIAL CHANNELS**

What you measure will vary depending on your foundations and goals, but another key takeaway is the importance of solid reporting. Having tools in place that allow you to track your activity on social media is critical. From Hootsuite to Sprout Social to Sprinklr, there are many options out there worth exploring. More info on these platforms can be found [here](#).

# 2

## UNDERSTANDING YOUR AUDIENCE

Far too often, companies are overconfident in their knowledge of their customers and prospects. It's understandable, as your sales force and internal experts have spent thousands of hours interacting with existing customers and prospects in more traditional ways.

But building a social media strategy allows for an inflection point on many things, specifically your knowledge of your target customer and social media follower. By building out this second pillar, you'll give your organization the best chance to connect and achieve your goals.

It starts with diving into your customer data and making sure you understand their journey. Are you able to track where they come in contact with you? If so, are you seeing any trends in terms of their expectations at those touch points?

Normally, we find that with a brief step back, companies can better segment their audiences and break them out into:

- 1. Primary Audiences** – these are customers or prospects who are most likely to engage with you, need your products or services, and be identified as influencers, decision makers and buyers
- 2. Secondary Audiences** – these may not be always be direct customers, but still could wield influence in your industry and have an impact on your brand's reputation – for instance reporters, media companies, event sponsors or trade associations all come to mind and often fall into this type of audience

Once you develop these audiences, you'll be able to better plan for the next pillar – the Bold Content Strategy.

You'll be ready to factor for the right content for the right group. And how much of your available resources (internal teams or professional services/ agency partners) you need to allot for each audience.

Another thing to consider when fine-tuning your audiences is understanding their existing conversations and attitudes on social media. [Social Listening](#) can be an insightful tool for uncovering these insights.

*A study by International Data Corporation (IDC) found that **75% of B2B buyers** and*

***84% of C-level or VP-level professionals** use social media to make purchasing decisions.*

<https://www.superoffice.com/blog/social-selling-statistics/>

# 3

## ESTABLISHING A BOLD CONTENT STRATEGY

Now that you've established why you're invested in a B2B or B2B2C social media program and who makes up your audience, **it's time to create bold, meaningful content** that will move the needle.

This is rarely an easy process. The natural inclination is to rehash product or service descriptions from existing marketing materials or crib language from brand communications or email marketing campaigns. Sometimes there's merit to that approach, but oftentimes it's important to take a beat and do some additional thinking.

Social media has proven itself to be a different beast – a place where followers appreciate stories, innovation, and brands that make human connections. They can see ads anywhere. If they follow and engage with you on social media, they're intrigued by a meaningful narrative, as well as the ability to get answers and responses exactly when they need them.

So therein lies the question. What's your unique story? Why will your audience care to follow you over the other options they have in their social media feed? What will keep them coming back? Answering these questions is a critical element of your content strategy.

Once audiences are established, typical content strategies can be broken out into these parts:

- Key themes
- Ideal content types/formats
- Specific opportunities to win the conversation and be bold

**96% of professionals surveyed want content with more input from industry thought leaders.**

**47% of B2B buyers viewed three to five pieces of content before engaging with a sales rep.**

**We use the phrase "willingness to execute" (or WTE) as a rallying cry for B2B social media programs.**

Once a solid content strategy is developed that will serve an audience extremely well, it's that willingness to execute that differentiates the winners from the pretenders. WTE means developing processes that work for your teams, building rapport with essential personalities throughout your organization that provide the basis for your content, delivering and repurposing content in a timely, relevant fashion, onboarding to the right technology, and being opportunistic within your company's means.

Connecting key metrics (as described earlier) to your content output is critical. It's important to find out what's working and what's not, and revisit your strategy bi-annually (annually at the very least) to keep it up-to-date and actionable.

[www.demandgenreport.com/resources/research/2016-content-preferences-survey-b2b-buyers-value-content-that-offers-data-and-analysis](http://www.demandgenreport.com/resources/research/2016-content-preferences-survey-b2b-buyers-value-content-that-offers-data-and-analysis)

# 4

## ACTIVATING ON THE RIGHT CHANNELS

Imagine for a moment that you need to buy a new car, a new television, or even a new dishwasher. If you're like a lot of people, you'll read reviews and develop your pros and cons list, giving yourself the best data to arrive at the best decision.

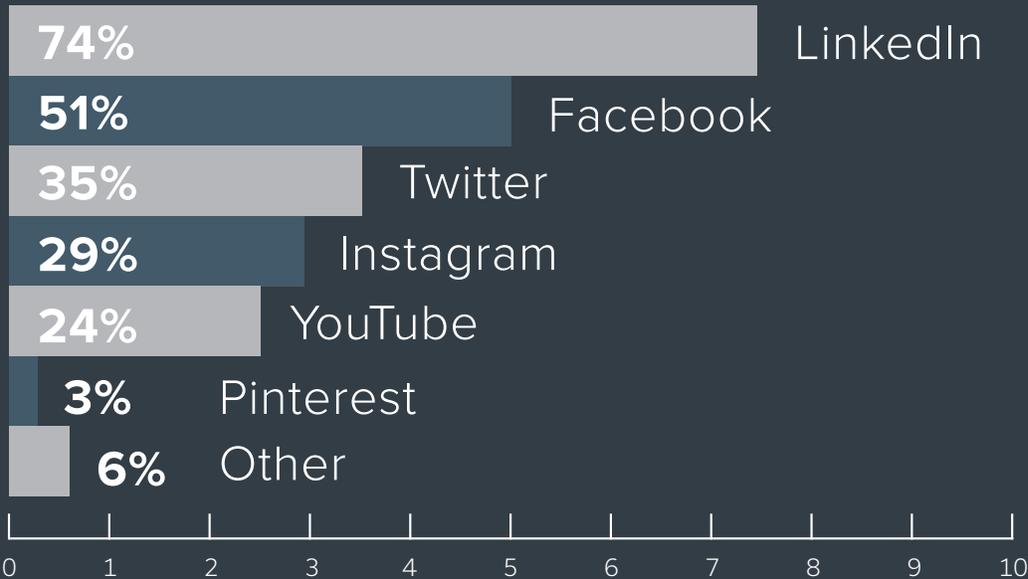
When developing a B2B social media strategy, it's important

to do the same thing with the available channels to understand which ones might be right for you. As digital and social channels have evolved, many are niche but follow under the classification of "social media" or "social networking," but not all may be relevant to your business objectives or well-traveled by your audience.

Likewise, if you're a global company, you'll need to factor for restrictions in some regions and different channels in others. This is especially true in China, where North American-based social media channels are restricted and WeChat is king.

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### WHAT ARE THE MOST EFFECTIVE SOCIAL CHANNELS FOR YOUR BRAND?



Chief Marketer 2019 B2B Marketing Outlook Report



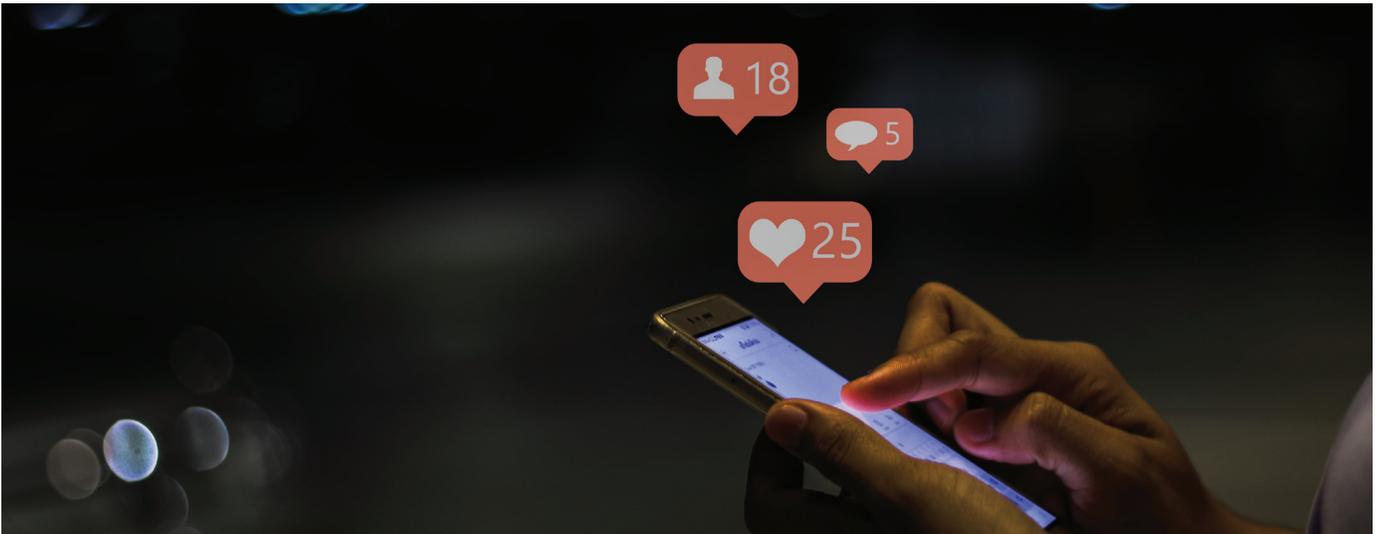
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In English-speaking countries, LinkedIn is generally regarded as the most relevant and effective B2B social media channel, and allows companies to run both organic and paid social media campaigns to exert their influence and reach their primary and tertiary audiences. But that's not to say that others, including Twitter and Facebook, won't have potential to help you reach your goals. It's important to dig deep on this channel audit and develop an approach that gives you the best chance to succeed.

When planning for channels to activate, it's also critical to think about the name you would want to display – often known as a handle – as well as how much you plan to publish organic social media posts on your accounts. A general recommendation might resemble the following:

- 3-6X daily on Twitter
- 1-2X daily on Facebook
- 1-2X daily on LinkedIn
- 2-3X daily on Instagram

That said, there are always exceptions to any standard and doing the work to get your approach right is critical.



## 5 BUILDING COMMUNITY MANAGEMENT & CUSTOMER CARE STANDARDS

Once you've got a strong content pipeline in place and channels you're committed to, you have a tremendous opportunity to enter into an ongoing dialogue with your followers and prospects. This is one of the most exciting and equally nerve wracking elements for B2B social programs - especially those operating in regulated industries.

The key is to be prepared and start simple. Preparation generally starts with knowing what matters to you from a compliance standpoint.

This varies from company to company, but we've found that it's good to involve and provide visibility on your social media strategy to any legal counsel partners you work with - so they're aware how the program works and how you're building governance thinking into the work you do.

As you begin to publish and build your social media activity, it's important to have a workflow established for moderation of your channels and any associated commentary related to your posts or your company's

brand. And then decide where and how you will engage any commentary. As part of the process, you will invariably want to create some prepared responses that allow you to answer standard questions or comments on social media with approved statements. Often, community managers will add some slight variation to the way they respond to questions or comments, but the core information or concept remains consistent.

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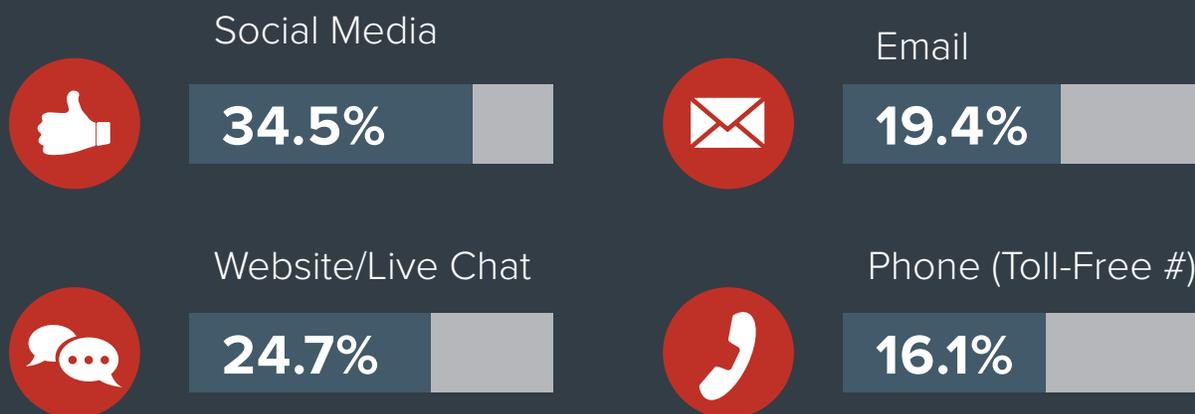
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More brands are inserting themselves into conversations that may or may not have originated from their content. This is a more advanced community management maneuver that should be initiated only after the foundational items are in place.

Lastly, there's the concept of customer care through social media. Data shows that with each passing year, more people get comfortable with using social media as the first point of entry for customer care. They've grown tired of waiting on hold in call queues and hope they can get an answer through

their preferred social media app – mainly LinkedIn, Twitter or Facebook. This creates a unique scenario where they have expectations around response time and general availability. Thus, customer care becomes a critical element of any strong B2B and B2B2C social media strategy.

## PEOPLE PREFER SOCIAL MEDIA FOR CUSTOMER CARE OVER OTHER CHANNELS



[www.leadfuze.com/building-customer-relationships/](http://www.leadfuze.com/building-customer-relationships/)

### KEY TAKEAWAY:

*The success of your social media program requires a great strategy, but also a first-rate social media manager. Whether you hire from outside the company or appoint a current employee take the helm, someone must be leading your social media efforts. It's not a part-time commitment – and certainly not the responsibility of an intern or junior staffer. Gaffes and gaps in your social media game can result in major hits to your reputation. Choose wisely!*



## 6

# EMPOWERING EMPLOYEES TO BECOME SOCIAL MEDIA ADVOCATES

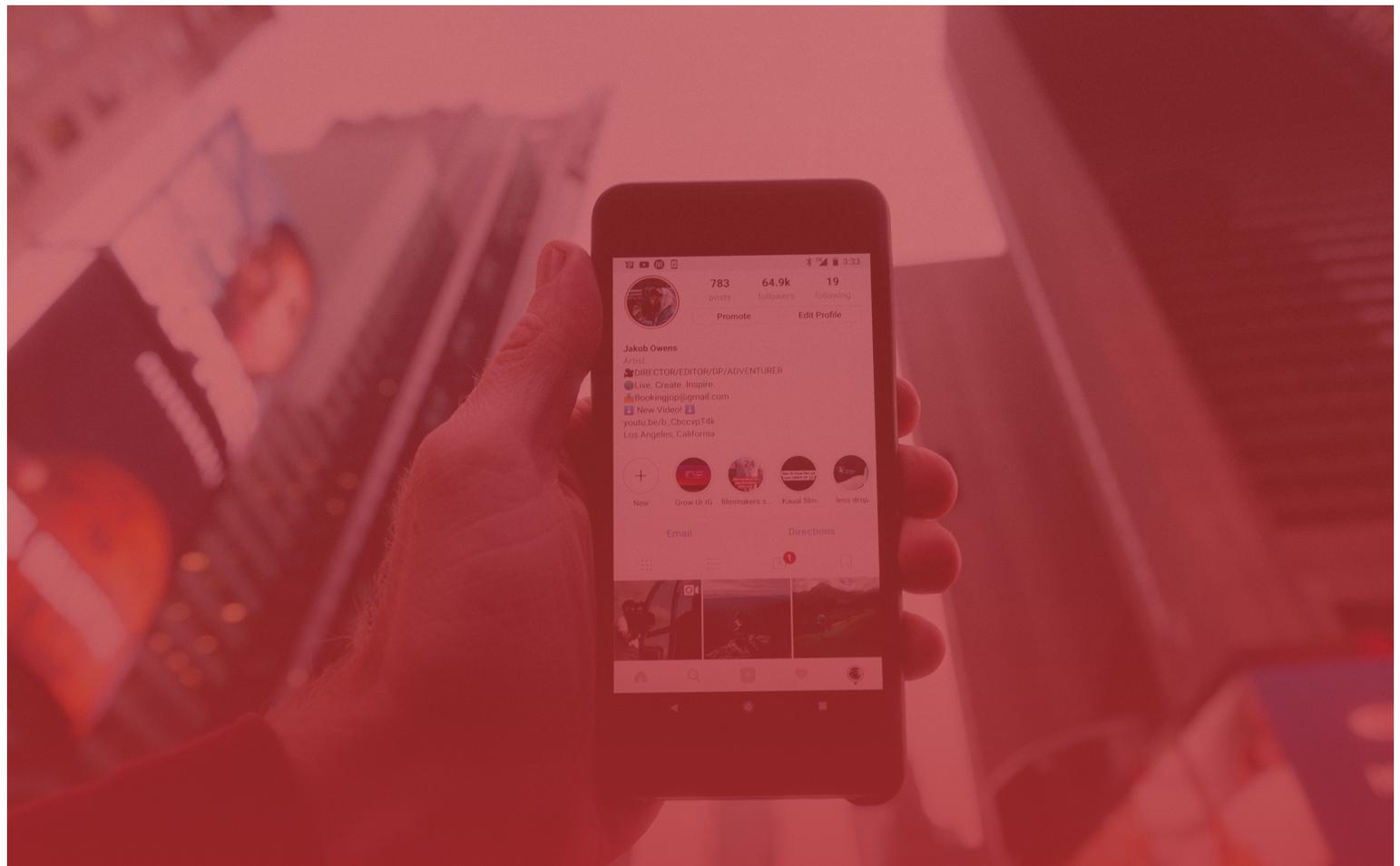
Employee advocacy is the newest pillar in our approach, and perhaps the one with the most potential to transform your brand. It's like the bow that ties the whole package together. The reason is simple. Employees have always been the strongest assets of any company. And it's truer than ever with the rise of social media.

Employee advocacy is defined as a strategic program that invites employees into the process of communicating

your organization's brand and purpose on social media and other digital channels. By providing a program and tools that allow employees to share a company's content across their social networks in a genuine way, you close the brand-to-consumer trust gap and create a scenario that's 16X more likely to be read and 8X more likely to receive engagement.

Based on the math and potential of employee advocacy, we've factored that 10,000 engaged

employees are the equivalent of approximately \$1.9M in ad spend. The numbers add up to a compelling argument for piloting an advocacy - or ambassador program as they're sometimes called - in your organization. This description only scratches the surface of what employee advocacy could do for you.



# THE TRELLIST B2B SOCIAL MEDIA OFFERING:

The best practices that we describe here are learned from working with Fortune 1000 clients on actionable strategy. We also partner with some of the best social media technology companies in the world to pick up new tools and tactics. Trellist can do the work for you and help you assemble a best-in-class B2B or B2B2C Social Media Strategy. If you have the WTE – the willingness to execute – let us be your partner in the effort and help you achieve success.

Trellist is a certified veteran-owned, Employee Shared Company®, with locations in Wilmington, DE, and Philadelphia, PA.

Contact us at [socialbusiness@trellist.com](mailto:socialbusiness@trellist.com) to learn more about our offerings and to start a conversation about your company's social media strategy.

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