



Master The Next Wave Of Social

Executive Overview: The Social Marketing Playbook

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WHY READ THIS REPORT

For the marketing leader, social media offers both a huge opportunity and daunting challenge. You know you can reach and engage your customers on social channels, but the environment is foreign — it's highly personal, resource intensive, and hard to measure. The result: While most marketers now use social media, too few have found the keys to unlocking its potential. The social marketing playbook provides you with a strategic approach for building social media programs that deliver real business value. Learn to weave social media throughout your marketing RaDaR; build a business case for investment and change; hire the right people and partners; execute the right tactics; and measure to gain insight and improve over time. This report was originally published on June 19, 2012; Forrester reviews and updates it periodically for continued relevance and accuracy.

YOUR SOCIAL MEDIA PRESENCE IS AN ISLAND

The majority of online adults around the world use social media regularly.¹ As social media adoption becomes more and more mainstream, marketing leaders race to keep up — creating blogs, communities, and Facebook pages, all too often without a clear road map in mind. Today, that's left many marketers at a crossroads. While consumers might engage with a few branded social programs, the vast majority of social media marketing efforts are half baked, poorly tended, and disconnected from the rest of companies' marketing programs. This causes several problems:

- **Social media doesn't support the rest of your marketing program.** Most marketers cite "engagement" as their key objective for social media — but fail to specify how engagement supports their overall marketing efforts. Too often, engagement doesn't increase brand awareness, bring prospects closer to conversion, or improve customer loyalty. What's more, siloed social engagement efforts often contain marketing messages vastly different from what you're promoting in other channels.
- **Social media isn't driving enough value.** Sure, you can cite a few famous examples of social "success" — but did they actually create value for the brands involved? And have you experienced demonstrable success at your own company? Ten years into the eras of paid search and email marketing, these channels were likely driving clear value for your business. Too few marketers can say the same about social media today.
- **It's hard to put the right resources into social media.** If social isn't embedded in the larger marketing mix, it's tricky to justify dedicating enough budget, staff, or technology to it. And when those are in short supply, you risk drifting into a downward spiral of underperformance.



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Social Media Should Be A Solution Rather Than A Problem

Your goal is to coordinate isolated social media programs so they contribute to your existing marketing plan and guide people through the customer life cycle. Specifically, this allows you to:

- **Help people discover your brand by reaching out to them.** People can't buy your product or service if they've never discovered it — but social reach programs provide a solution. For example, the Tennessee Department of Tourist Development invited a popular blogger to take a family vacation in the area and document it online. The influencer marketing strategy drove millions of impressions and contributed to an 11% increase in travel to Tennessee.²
- **Let people explore your products by offering them depth.** Social tools can both showcase your products and services and help prospects make the right purchase decisions. For instance, German online bank Consorsbank built a community where prospective customers could ask questions. The result? A 30% increase in conversions.³
- **Engage customers to build long-term relationships.** Social media is often an effective way to answer the questions customers ask and to boost their long-term loyalty. For example, Starbucks used a special Twitter account to alert pumpkin spice latte fans when the drink would be back in stores, and gave them a chance to buy ahead of schedule. The strategy drove a 22% increase in sales.⁴

LEARN TO BUILD SOCIAL MEDIA INTO THE MARKETING RADAR

This playbook is designed to help marketing leaders turn social media from a problem into a solution. By approaching social as a key — but not a standalone — component integrated into a larger marketing strategy, you will be able to create provable, repeatable social success. In this playbook, you will (see Figure 1):

1. **Discover your social opportunities.** We lay out what you need to discover the benefits of weaving social media throughout the reach and depth and relationship layers of your marketing RaDaR and help you gather the resources to do it right.⁵ Use our rich Social Technographics® data to build a business case for investment.⁶
2. **Plan how to create a social strategy.** We help guide you as you set your social strategy. Using our maturity self-assessment, compare your strategy with those of other companies; it will help you determine what steps to prioritize. And use our POST framework to plan a social program that supports both your audience's preferences and your business' needs.⁷
3. **Act using tools that ensure success in the field.** As your team members begin to execute your strategy, equip them with best practices that show not only the mechanics of how programs work but also how successful they have been for marketers like you.⁸ Also, determine what vendors to partner with, using our customizable Forrester Wave™ tools.⁹

4. **Optimize by benchmarking your success and improving over time.** Use our “Win The Social Marketing Measurement Game” research to measure the value of social media — not just as an engagement tool but also throughout the customer life cycle.¹⁰

Figure 1 The Social Marketing Playbook

DISCOVER	PLAN	ACT	OPTIMIZE
Vision	Assessment	Organization	Performance Management
Landscape	Strategic Plan	Best Practices	Benchmarks
Business Case	Road Map	Tools And Technology	Continuous Improvement

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ENDNOTES

- ¹ More than 75% of online consumers in most developed markets — and more than 90% in emerging markets — use social tools. See the “[Introducing The New Social Technographics®: The First Step Toward Social Success](#)” Forrester report.
- ² The documentary film about the vacation kind of makes us want to visit Tennessee, too. Source: “Family Memories. Made in the Great Smoky Mountains, by VML,” empowered (<http://groundswelldiscussion.com/groundswell/awards/detail.php?id=1304>).
- ³ That 30% increase in conversions led to 1,500 additional new account openings each week. Source: 2015 “Consorsbank’s Investment in Community Delivers Great Returns,” empowered (<http://groundswelldiscussion.com/groundswell/awards/detail.php?id=1286>).
- ⁴ The account also got mentioned on The Tonight Show. Source: “Pumpkin Spice Latte Fall 2014,” empowered (<http://groundswelldiscussion.com/groundswell/awards/detail.php?id=1222>).
- ⁵ To unlock the value of social marketing, you’ll need to effectively integrate social into your established marketing plan — and the marketing RaDaR model holds the key. This report of our social marketing playbook lays out Forrester’s vision for how social tactics can supply reach and depth and relationships to your marketing plan. See the “[Integrate Social Into Your Marketing RaDaR](#)” Forrester report.

- ⁶ This report, which provides the landscape for our social marketing playbook, reveals Social Technographics® trends among key audiences and shows marketers how to find — and use — Social Technographics data for their own customers. See the “[Introducing The New Social Technographics®: The First Step Toward Social Success](#)” Forrester report.
- ⁷ Want more details on our four-step POST method for marketing leadership professionals working on social programs? First, examine the Social Technographics® Score of your target audience. Second, choose your objective: Are you expecting social to support your marketing program by creating reach, by offering depth, or by cultivating relationships? Third, build a strategy for how you will accomplish your goal and which social platforms and sites you’ll use. Finally, pick the appropriate technologies and vendors to help implement those strategies. See the “[The POST Process Drives Social Success](#)” Forrester report.
- ⁸ In April 2014, Forrester announced the winners of the eighth annual Forrester Groundswell Awards. The awards recognize the very best in social marketing — focusing on programs that go beyond engagement metrics to deliver real business value. We’ve collected the important lessons that marketers can learn from our 2014 winners into a single report for your reading pleasure. See the “[The Four Social Programs Every Marketer Should Study](#)” Forrester report.
- ⁹ Most marketers need no more than four types of social technology partner: 1) social listening platforms, which help companies plan social marketing programs; 2) social reach platforms, which allow marketers to deliver messages to audiences beyond their fans and followers; 3) social depth platforms, which help marketers add social tools and experiences to their sites; and 4) social relationship platforms, which help companies engage customers on social networks. See the “[The Forrester Wave™: Social Relationship Platforms, Q2 2015](#)” Forrester report, see the “[The Forrester Wave™: Social Depth Platforms, Q3 2013](#)” Forrester report, and see the “[The Forrester Wave™: Social Advertising Platforms, Q4 2013](#)” Forrester report.
- ¹⁰ To measure the success of social marketing — indeed, of any marketing tactic — you need to think of your customers’ journey as a board game like Monopoly: 1) identify which stage of the customer journey your social marketing program is designed to support; 2) measure whether your social marketing efforts have moved your customers to the next stage of their journey; and 3) count how many times your customers pass “go” so you can collect \$200. If you keep your customers moving around the board, eventually you’ll win the game. See the “[Win The Social Marketing Measurement Game](#)” Forrester report.

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