Social Media Playbook

A how to guide for marketing and communication professionals

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"There's no rule book. Social media is a giant, chaotic experiment" – Mark Drapeau

Foreword

The growth of social media presents many new opportunities and challenges for communication and marketing professions across industries. The rise of informal and organic networks, the proliferation of 140 character conversations, and mobile status updates gives everyone new vehicles to share opinions and insights. Often these opinions and insights are not based on hard facts, but one fact is certain – blogs, communities, social networking sites and micro-blogs enable anyone to contribute to an endless and organic conversation taking place in cyberspace.

What impact has the rise of social media and the associated new influencers had on perceptions? What about buying behaviors? There is little doubt that these new tools are having an impact on how users perceive brands. For instance, Robert Scoble, a proficient Twitterer, can make or break a new product/solution with one of his 140 character posts. Social Web firm BuzzLogic found that about 50 percent of people who read blogs turn to the blogosphere when making a purchasing decision. So the answer is yes, social media is a powerful tool to impact perceptions and, for some, buying decisions.

But how are influencers using these tools? There can be little question that traditional media and analyst influencers have begun using these new "social" tools to capture insights about trends, push out their opinions that link back to deeper analysis found in reports, and gain new followers/friends with the goal of either stimulating more conversation around various topics or driving interest/traffic to a specific report. Simultaneously, a new cadre of influencers is emerging within these informal and ever-changing networks. Old and new influencers are using these new social tools to enhance their profile as experts and thought leaders.

So who are these new influencers? Everybody! From the individual developer (i.e. MVPs) to high profile and monetized bloggers (i.e. Nick Carr) to soccer moms (i.e. Cafemom.com) or daddy bloggers (i.e. savvydaddy), new influencers come in all shapes and sizes. As with traditional media and analysts, strategies and programs should be designed to fit the specific requirements/preferences of these new influencers.
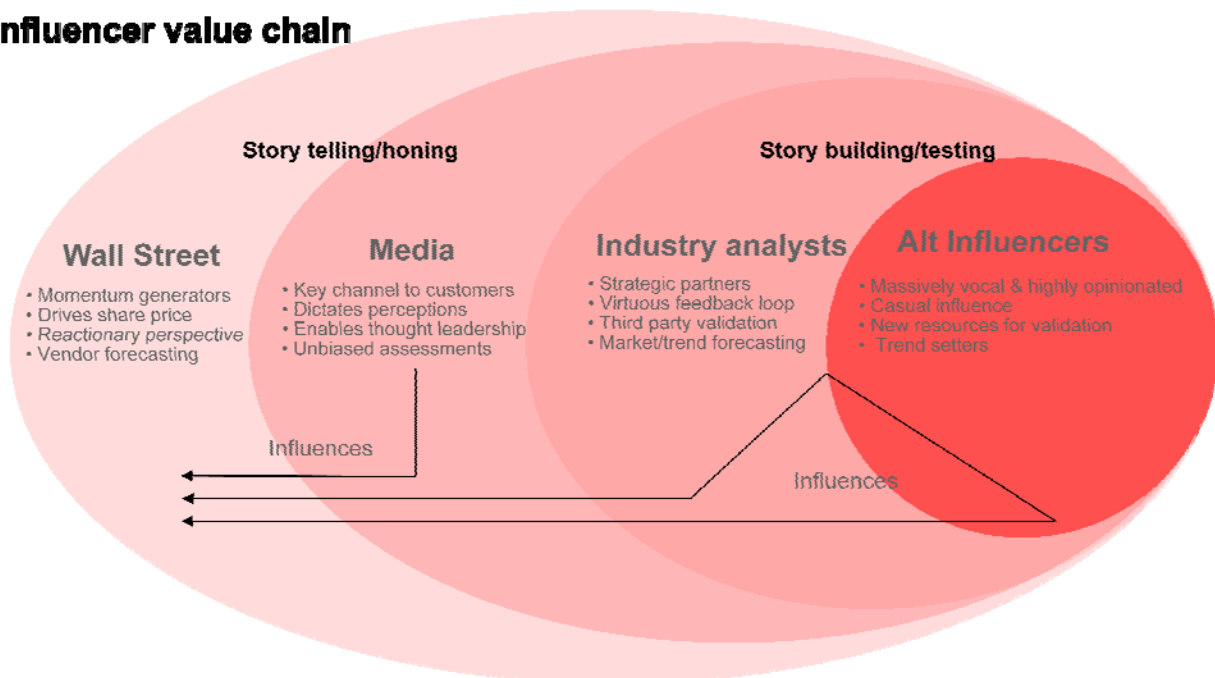
This playbook outlines some of the most prominent social media tools, the nuance associated with these tools, the value they bring, and some guidelines to utilize them to engage old and new influencers alike. There isn't "one right way" to approaching social media , but doing nothing is not an option!

Communications influence value chain

It's worthwhile to showcase how the communications influencer ecosystem has shifted with the advent of social media. Traditionally, analysts were thought of as the first line of defense. From there you moved upwards to the trade press and business journalists. Once you've got the media up to date, your story should be mostly baked. Your last stop, assuming your story is fully baked is the Wall Street analysts. These were the old days.

Now there is a new cadre of influencers. These folks can be considered alternative influencers. They are bloggers, students, academia, online pundits and soccer moms. They are increasingly a resource to help new and old influencers alike shape perceptions of a given brand, product or idea. It is the new or alternative influencers that this paper will focus on. Below is a chart that outlines the influencer value chain and how each influencer group is utilized for a specific purpose.

Influencer value chain

Story telling/honing

Story building/testing

Wall Street
- Momentum generators
- Drives share price
- Reactionary perspective
- Vendor forecasting

Media
- Key channel to customers
- Dictates perceptions
- Enables thought leadership
- Unbiased assessments

Industry analysts
- Strategic partners
- Virtuous feedback loop
- Third party validation
- Market/trend forecasting

Alt Influencers
- Massively vocal & highly opinionated
- Casual influence
- New resources for validation
- Trend setters

Influences

Influences

While the ROI of building programs around new influencers is not clearly defined, there is a huge opportunity cost to doing nothing. On the flip side, it's good to keep in mind that ill conceived efforts can lead to PR disasters. A recent (August 2008) example of such a disaster was Exxon Mobil's "Janet" debacle, where an individual falsely portrayed herself as an Exxon employee on Twitter. This fallacy had significant trust, transparency and perception ramifications for Exxon. A PR nightmare to be sure! Forrester's Jeremiah Owyang chronicles a running list of brands that got punk'd by social media. In the end however, tapping into these new influencers can open up many doors, and incorporating social media/networking strategy/tactics to reach them into your communications plans should be a serious consideration.

There are many different types of alternative influencers. From the "pushers" or connectors (i.e. Robert Scoble and Guy Kawasaki) to the pundits (i.e. Tim O'Reilly and Chris Brogan) to the social media wizards

(i.e. [Jeremiah Owyang](#) and [Chris Pirillo](#)), there is no shortage of new influencers to tap into. By listening and navigating through the noise you can identify the right group of alternative influencers with whom to build relationships. There's certainly no shortage of opinions out there in the blogosphere and Tweetsville!

Social media landscape

Social media can be used to help organizations identify and cultivate new "fans" and "followers." Any organization that touches external audiences (customers, partners, influencers) can utilize blogs and communities to impact perceptions and buying behaviors. However, some behavioral changes certainly have to occur in order for these tools to be used effectively. For instance, marketing professionals should not view Twitter or Facebook as a vehicle to "push" messages out to audiences. Rather, they should listen and participate in the ongoing discussion organically taking place. Likewise, communications professionals cannot post a press release on a blog and expect to get traction. They, too, must listen and participate where appropriate.

The information below provides an overview of some of the most prominent social media tools that can be used to identify and engage influencers.

BLOGS

Blogs can be a paragraph about your favorite music artist or a two-page polemic on your thoughts about the Obama presidency. The underpinning value of blogs are the opinions (preferably fact-based and backed up with links to relevant research) espoused. It's important to note that there are thoughts of blog posts that could be relevant to your area of coverage, but you cannot track them all. By listening to the banter, mapping the linkage landscape and prioritizing the most influential posts, you will be well served as you jump into the conversation.

In terms of identifying and tracking, you do have resources to help you navigate the blogosphere. Indeed, there's a whole cottage industry that's evolving around identifying the most influential blogs on any topic you can imagine. Companies like Radian6, BuzzLogic, and Trucast have created some very complex algorithms that help marketing and advertising organizations identify and track the blogs with the biggest (relevant) footprint. These tools can be invaluable to any company seeking to utilize social media for perception impact and/or brand enhancement.

These pure plays are a good starting point to identify the thought leaders, but organizations also need guidance on effective strategies/tactics for engagement. Industry stalwarts, such as Wunderman and Forrester Research have created specific practices around social media. Similarly, newcomers such as Mzinga, Powered, and MotiveQuest have carved out a niche in helping companies build communities and leverage 2.0 tools to drive business and brand management. Even PR firms like Waggener Edstrom and Coyne PR are strategizing to help their clients understand and benefit from social media tools.

Perhaps some of the best resources for understanding and using social media are the independent consultants that have cropped up over the last couple of years. Thought leaders like Charlene Li, Jeremiah Owyang, Chris Brogan, and Andy Beal have positioned themselves well as more and more companies jump on the social media bandwagon.

Below are some guidelines to consider when building a blogging strategy.

	Implementation
Objective	• Identify thought leaders

	• Listen & contribute to relevant conversations • Cultivate champions/evangelists • Enhance brand awareness
Nuance	• Opinionated & informal analysis • Participatory vs. promotional engagements
Value	• New 3rd party references • Expanded sphere of influencers
Action	• Listen & prioritize (not all blogs are created equal) • Jump in the conversation (with thoughtful/valuable insights)
Tools	• Technorati, Wordpress, Blogger, Radian6, TruCast, Mashable, Digg, Delicious

There is no "correct" way to do blogs. The best education to understand the vulnerabilities, opportunities and challenges associated with blogging is to just do it. Jump in, test the medium and make yourself an influencer. Read peoples' blogs you admire, want to get to know. Rate and comment on their posts. Be advised, though, that blogs have made it easier for anyone to comment on your line of thinking. Popular services like Digg allow users to rate a given post, thus allowing the most popular to bubble to the top. It's important to remember that someone will likely find and potentially rate your opinion, so it's crucial to have a healthy appetite for criticism and praise alike.

MICRO BLOGS

Micro blogs, not unlike their big brother counterparts, offer an effective and easy way to pontificate. The only hitch is that you have to pontificate in 140 characters. With micro blogs, brevity is king. Unlike blogs, which tend to be topic or industry segment-specific, micro blogs are riddled with "noise." People post updates on what they're having for dinner, rant about how their teenager is wearing on their nerves, and other banality of everyday life. However, if you're tracking the right micro bloggers you can uncover a wealth of information about relevant and timely announcements…often before it reaches mainstream media.

The notion of "breaking news" is the Holy Grail for micro bloggers. Even if derived from a press release or vendor site, proficient micro bloggers have proven to be a good source of viral marketing and digital storytelling. Beware that many of these bloggers/micro bloggers (and the lines do definitely blur between the two) do not subscribe to the traditional messaging filters associated with institutionalized media and analyst relations. Thus, they typically do not shy away from offering hard edged opinions, criticism and/or praise.

> Note: Micro blogs are used by both traditional and new influencers alike. The former are increasingly utilizing the medium as a way to test ideas, gather informal feedback for an upcoming report/story, and offer up opinions. The latter are using this medium to grow their sphere of influence and build relationships to drive their consulting businesses.

Twitter has emerged as the pillar of the micro blogosphere. Twitter is, in essence, voyeurism in text format. Unlike traditional chat utilities like AIM, Communicator or Yahoo! Chat, Twitter is a one-to-many

form of communication that doesn't require a response. It's a good way to start a conversation with a group of people you know and possibly don't know.

Once you sign up on Twitter your mission is to find interesting people to follow – both from a personal and professional perspective. There's a Twitter [search engine](#) that makes it fairly easy to find people (especially if you know their "virtual handle"). The second step is to find interesting conversations, contribute and grow your followers. Twitter can be all consuming however, so some tips for "jumping in" include:

- o Follow only people you find interesting
- o Download an aggregator like [Tweetdeck](#)
- o Raid your followers' followers (see who's influencing the influencers)
- o Welcome and thank your followers (show them you care with a personal response, not with auto DMs)
- o Let down your protective barriers; most twitterers are very friendly
- o Be casual, transparent and never use Twitter to "promote"
- o Make time to Tweet (a good strategy if you can pull it off is to dedicated specific times to Tweet so your audiences know when to expect to hear from you)

As one [blogger](#) noted, Twitter is very much a "now" medium. Those who tweet operate in hyper speed, and it's futile to try to keep up. This timeliness or "now-ness" of Twitter is really its underlying value. However, this near real-time feed of thoughts and opinions makes the prioritization element all the more critical. A good rule of thumb is to not try to look back at past tweets and focus on staying up with the current conversation.

In addition to being a new medium of communication, Twitter has also given rise to a new language. From retweeting (RT) to dweet (drunk tweet), Twitter, not unlike instant messaging, requires users to learn a new digital lingo. Getting smart on the lingo will help you navigate the noise. Some resources to consider are [Twittonary](#) (Twitter library), [Twellow](#) (Twitter phone book), and [Mr. Tweet](#). Another good resource is a post from [Dan Hollings](#) on some Twitter tips and tricks.

While Twitter is open to anyone, another micro blogging tool that's gotten a lot of attention lately is [Yammer](#). Launched in September 2008 by [David Sacks](#), Yammer operates pretty much the same as Twitter, but is designed to be a more closed micro-blogging tool. Yammer is really Twitter for businesses, and allows individuals with the same corporate email address (i.e. @microsoft) to connect and share. The guidelines for Yammer are pretty much the same as Twitter save for specific nuances of a given corporation.

To date, [Tim O'Reilly's](#) team has conducted the most comprehensive study on the micro-blogging – or in O'Reilly's terminology, micro-messaging – phenomenon. In a November 2008 report titled, "[Twitter and the Micro-Messaging Revolution](#)," O'Reilly's group outlines the myriad tools, success metrics and offers an informed opinion on the future of micro-messaging. On 25 February 2009, [Laura "@pistachio" Fitton](#) offered up her opinion in a webinar titled "[Twitter for Business 101](#)." Both O'Reilly and Fitton are must haves on your Twitter radar!

Below are some guidelines for becoming an effective micro-blogger.

	Implementation
Objective	• Start a conversation • Offer insights that make people want to "follow you" • Build new relationships
Nuance	• 140 characters • Organic and always on • Originality
Value	• Near real-time sharing of ideas/opinions • Identification of new influencers • Virtually unlimited opportunities to join a conversation
Action	• Procure a Twitter and Yammer account • Share your thoughts
Tools	• Twitter, Yammer, Tweetdeck, Twitt(url)y, Twellow, Mr. Tweet, Ping.fm

I think the quote from Ryan Deal, who is a creative personality on Twitter, sums up the phenomenon and its scale, "Twitter is undoubtedly becoming one of the fastest growing social media tools in existence. As it continues to expand, so too does the diversity of its user base."

Go micro blog; be real, be transparent, but most importantly be yourself!

COMMUNITIES

Communities are another relatively new venue for peddling influence and shaping perceptions in the digital realm. By community, we're talking about those of the virtual or online flavor. Just like their real-world counterparts, these virtual communities are comprised of people with common interests and with a shared sense of social cohesion. Most successful communities are organic and viral. Perhaps the most important thing to remember about online communities is that they cannot be controlled, and if you try to control the community it will fail.

Communities are really the umbrella that gave rise to many of the other social media tools discussed above. At their core, the early communities were simply a way to exchange information - to have a conversation across geographic boundaries. They have definitely evolved significantly since those early days, but it's important to keep in mind that it's in communities where the people gather, and from there they employ a myriad of tools to converse and share.

A brief history

The notion of online communities is not new. Indeed, social software has been around since the mid-80s. Usenet was probably the first formal virtual community, and was designed as a distributed Internet discussion system. Another well known example of an early community is the WELL. Started in 1985 by Stewart Brand and Larry Brilliant, the WELL was designed as a bulletin board system and is thought to be one of the original dial-up ISPs in the early 90s. The

> WELL attracted a lot of great minds and inspired the development of the Electronic Frontier Foundation along with a seminal book called *The Virtual Community* by Howard Rheingold.

Fast forward to the mid-2000s and the vision of these community pioneers has been writ large. According to a January 2009 study by Forrester Research, 28% of the 2,210 respondents indicated that they use a social networking site at least once a month. This is not a trivial number of people. The high level insights below give you an idea of how some of the most prominent communities/social networks have evolved:

- Friendster (Mar 2003): 90M registered users; 61M unique visitors/mo globally; 90% of traffic comes from Asia; listed in the top 20 global websites based on traffic
- LinkedIn: (May 2003): 30M registered users as of Oct 2008 across 150 industries; business-focused community
- MySpace (Aug 2003): In June 2006 was the most popular social networking site in the US; 100 millionth account was created on 8/6/06; by mid-2006 attracted 230k visitors per day; bought by News Corporation for $580M in July 2005
- Facebook (Feb 2004): More than 150M active users worldwide; originally designed for Harvard students; opened to everyone 13 and above in Sept 06; half of users are out of college; 70% of users outside of the US
- Digg* (Nov 2004): Boasts about 35M unique visitors per month; rating/voting system raised the bar on how users digest/discuss media
  *really an aggregator of news, but has spawned a very loyal community of critics

All these social networks share a common objective: bring people together and give them the tools to share their lives. Each of these communities enables multimedia sharing, integrate with other networks and offer a mobile application across devices. Additional details on these prominent communities can be found in the Appendix I: Communities.

Below are some guidelines for operating within communities

	Implementation
Objective	• Build/enhance brand • Expand network of influencers • Share opinions/insights on market trends
Nuance	• Conversational & casual • Fragmented & fleeting
Value	• More personal interaction with influencers, customers, partners • Extended conversations taking place in traditional outlets • Reaching a broader audience of influencers
Action	• Become a fan of groups influencers belong to • Get to know the social side of thought leaders • Start/join a conversation

Tools	• [Facebook](), [MySpace](), [Friendster](), [Digg](), [LinkedIn]()

Another important community that deserves recognition is the gaming community. Gamers are probably the most ardent, loyal and vocal sub-community operating in the online world. From the PC role players to the hardcore [XBOX]() gamers to future forecasting [Superstruct]() players, the gaming community is large and dedicated. Whether on a game counsel like Wii or PS3 or PC, gamers have given rise to virtual worlds that promise to change the way we collaborate both professionally and personally (see [SecondLife]() as a good example).

Some interesting statistics on the growth in the gaming community:

- o [Gartner]() predicts that mobile gaming will grow to be a $6.3B market by 2011
- o A Dec 2008 [Jupiter]() survey found that one in 20 online adults in the US spent 6+ hours a week playing games and spent $200+ on games in the last 6 months

Communities offer a great way to stay connected to friends, family and colleagues. Whether you subscribe to a mainstream community like Facebook and MySpace or to those that are a bit more esoteric or focused on special interest (i.e. [FIQL]() for music), if managed properly they can be fun and informative. Perhaps more importantly, if used appropriately businesses and organizations can use communities as a vehicle to drive messages, brand and perhaps even impact buying decisions.

Influencing perceptions through social media

Social media has given rise to new ways to shape perceptions and influence buying decisions. From Twitter to Facebook to Friendfeed, these new social networking tools are forcing marketing and communications pros to think and act differently when telling…or selling…stories. It's a wild west out there, and there doesn't appear to be a "right" way to use social media tools to tell stories. As you employ different strategies for different social media environments, you will fail. There is no doubt about it; failure is inevitable with disruptive technologies. Prepare your stakeholders accordingly, but note that there is also room for limitless success as well!

Employing a comprehensive strategy across outlets – from Facebook to YouTube to Twitter – has proven to be an effective tactic to enhance perceptions in the virtual world. Obama's campaign is often held up as the example for impacting change across a variety of social media. However, you don't have to employ all types of social media. Comcast, for instance, has effectively utilized Twitter to enhance customer service. Starbucks has used communities to engage its loyal customers in helping to map the future of the company. Again, there is no "right" way to do social media.

Whereas the currency for traditional PR/AR is press releases, pre-briefs and buddy mails, in the realms of social media the currency is conversation. It's a conversation about politics, the evolution of technology, what Fred is having for dinner and how angry he was for having to sit in two hour traffic on his way home. Promotion in social media doesn't work. Participation is the principle to live by if you're going to engage bloggers, twitterers, and the like.

So how do you get started? Based on discussions with industry experts such as Charlene Li, analyst firms such as SageCircle and Forrester, consultants at Mzinga and MotiveQuest, and communication pros from Waggener Edstrom and Coyne PR, there are some table stakes that must be considered if you are going to win "fans" in the virtual hallways of social media and online communities. Below are five pillars that any marketing or communication pro should consider when trying to shape perceptions using these new tools.

1. Build your network

The first thing you need to do is build a network of friends/followers. This isn't easy given all the noise that is currently out there. You've got to be compelling to win friends/followers. We're all busy and increasingly being pushed to be more accountable and productive. However, here are some key things to consider when building your network:

>   a. Identify people (friends/followers) with similar interests, but don't limit yourself to like-minded people
>   b. Do not try to control your network; they are organic by nature
>   c. Be yourself, authentic and transparent

The key thing to remember is that social networks are informal conversations. Traditional means of communication riddled with marketing fluff does not resonate. Trust should be your key objective when

trying to build your network and that can only be achieved by adding value to the conversation and offering informed opinions where appropriate.

2. Listen

Once you've got a network, you need to start listening to the conversation. Keep in mind that listening really means hearing what your friends/followers are saying. If they're talking about football, talk about football. If they're discussing recipes or venting about their children's grades, follow suit. Do not force the conversation to map to your motive to win "fans." You will fail. Listening is perhaps the most important element to any effective social media influencer strategy. To quote Charlene Li, "you wouldn't go to a party of strangers and start shouting at them. You'd go in and join in the conversation." Same principle applies to virtual parties – listen and contribute.

3. Prioritize

You cannot follow everyone with an interesting opinion (although Tweetdeck makes it easier). You have to determine your threshold for the topics that are of personal interest to you and those topics that you're responsible for in your line of work. If your goal is to identify a subset of people who are talking about a specific solution use a tool to identify the proper community. Free tools like Technorati can help, but if you want a more comprehensive view of the conversation look into TruCast or Radian6. These types of tools will save you time, and help you hone the list of influencers that are most relevant to your business.

Once you've identified the folks who are talking about your areas of interest, you'll need to start monitoring the conversations to see who the thought leaders are. This can be tricky. There are pundits that offer opinions and those who perform more of a redirecting/retweeting function. Both groups wield influence, but it's an important distinction that must be considered when developing your priority list.

> *Suggestion: Don't get too caught up in assigning so much value on followers and number of posts/tweets, as they may not be the best metrics to consider as you prioritize your list. Sometimes individual contributors can wield a lot of influence on a given topic, so you're scope and objectives must be well defined.*

Those at the top of your list should be those with whom you strive to make stakeholders in your cause. These are the A-listers that you bring in for consultations, break early news/pre-brief, invite to special events. While the A-listers are the friends/followers that can have the most impact for your cause, the B and C-listers should also be engaged on a consistent basis as well. You don't know who they're influencing and the impact that they'll have on shaping perceptions in the future. My advice would be to devise tactics to engage all levels of influencers.

4. Participate

Now we've got a network, we know what they're saying, and we have an idea of most influential members. It's time to jump in the conversation. Social media is not for the timid. You will be criticized,

but you'll also get praise. It's important to keep in mind that these people are just that…people. They don't want to be told, they want to be informed. They don't want to be marketed to, they want to participate in a meaningful conversation.

You can participate in many ways and in many forums; there's no shortage of social networks or tools out there! Find a topic that's interesting to you personally or professionally and jump in! Remember, the underlying goal of engagement is to build mutually beneficial relationships. Keep this in mind and you'll do just fine.

5.   Evolve & Measure

Social media is the farthest thing from static. Any influencer program designed around social media must be nimble, agile and highly flexible. Structured programs seeking to reach new influencers across social media are doomed to fail. Again, these are informal networks, and underpinning that informality is an inherent flexibility. Businesses seeking leverage the power of Twitter, Facebook, Friendfeed or blogs need to internalize the "pasta" business strategy. If something doesn't work the first time, try a new tactic.

Determining the ROI of a new influencer strategy for social media isn't easily defined. There are some key metrics to take into account. How well the story is resonating with target audience (i.e. retweets, blog comments), linkages between networks, shift in perceptions, tone of posts, and number of followers/friends are all good candidates, but these are early days so the bottom line value of such programs are not as straightforward as traditional marketing/PR/AR. You're not doing traditional marketing/PR/AR, so find what works for you and your organization by way of measuring success.

Take away

There are many ways to tap into the new influence peddlers out in the virtual world. Understanding who's shaping perceptions, where they're getting their information from, listening to the conversation and testing different engagement strategies/tactics are table stakes. While the ROI may not be readily apparent and the institutional barriers in any organization may be cumbersome, the cost of not joining in could be enormous.

Driving results with social media tools

The first consideration that must be addressed before engaging external audiences via social media tools is fleshing out the objectives. It's easy to get lost trying to boil the ocean when exploring the vast possibilities of social media. Having a clear objective of what you want to achieve when using blogs, micro blogs and communities will serve you well as you jump in.

Objectives must be considered through a variety of lenses. Here we focus on marketing and communications. To be sure there is overlap between the two lenses, but there are some subtle nuances. So what are some objectives to consider for marketing and communications professionals?

	Marketing	Communications
Strategic objectives	• Enhance brand awareness • Drive sales/market share • Improve customer satisfaction	• Build network of evangelists • Drive positive perceptions = sales • Start a conversation
Audience objectives	• Identify brand ambassadors (customers, students, partners) • Build relationships with customers/partners	• Identify new influencers (academia, consultants, students) • Build relationships with key influencers
Tactical objectives	• Listen to the dialogue & find conversations to improve narrative • Create fruitful feedback loops through participation • Map the perception ecosystem	• Listen to the opinion shapers & engage to ensure positive sentiment • Participate to understand emerging trends • Map the influencer landscape
Metrics	• Increased interactions with influencers • Growth in topic posts/mentions • Positive change in sentiment	• Velocity of posts by influencers • Volume of comments/posts • In/outbound link popularity

Objectives can be malleable and can change depending on the social medium used. The baseline objectives outlined above should give you a starting point. Once you have the objectives clearly spelled out you're ready to jump in!

10 Commandments of Social Media

Now that we've got some guidelines on how to conceptualize developing a social media strategy, let's explore some of the "must dos" when jumping into the social media world. While these guidelines do not guarantee success, they do provide a baseline of some of the tactics you can employ to be better prepared to start a conversation and build fruitful relationships using social media.

1. **Thou shalt know thy audience prior to engaging**
   Effective engagements with influencers operating in social media circles necessitate a change in the way we think about communications. There are new rules for engaging, new methods for outreach, and new strategies that must be undertaken to ensure messages resonate in social media outlets. Knowing their interests and areas of coverage can lead to fruitful new relationships that can enhance perceptions of Microsoft, and hopefully positively impact buying decisions.

2. **Thou shalt listen to your audience**
   Understanding who the thought leaders are, their preferences for engagement, and their interests is essential to any communications campaign targeted at social media. By listening to customers and influencers posting on Twitter, friending on Facebook, and updating blogs can significantly enhance the relationship bonds that exist or are being created with new influencers.

3. **Thou shalt understand the landscape of influencers**
   It is crucial to understand the influence linkages. Are academics influencing analysts? Are individual contributors (i.e. developers) influencing A List bloggers? Understanding how to map the landscape will better equip communication & marketing professionals to deliver targeted messages and build relationships with appropriate influencers.

4. **Thou shalt treat new influencers as a distinct group**
   Social media has given traditional influencers new vehicles to publicize opinions/analysis. However, outlets such as Twitter, Facebook, Friendfeed, etc. have also given rise to a new cadre of influencers that are helping to shape perceptions, and, to some extent, purchasing decisions. As with analysts and the press, bloggers/twitterers see themselves as a distinct subgroup. It is therefore essential that communications & marketing professionals alter the way in which they view these new influencers and cater to them as a new subgroup of influencers. This means that Microsoft should consider hosting blogger roundtables at events; Twitter social meet ups; Facebook events, and the like.

5. **Thou shalt not use social media to promote a brand/initiative/product**
   Social media is not about marketing in the traditional sense; it's all about participating in an ongoing discussion. It's about developing a relationship vs. launching a campaign. It's about giving the communities valuable data, early insights to upcoming announcements, and strategic guidance. Discussions taking place in social media circles are informal and conversational. Promotion of a brand or product will not resonate in most circles. Employing traditional PR & marketing tactics in social media outlets will likely fail to capture audience mindshare.

6. **Thou shalt fully disclose company association when brokering relationships**

Transparency carries a lot of weight in social communities. Operating under an @Microsoft alias will likely lead to suspicion. It is proven that being up front and honest with your association to a given company, organization or specific campaign can lead to trusting and value-driven relationships in the virtual world.

7. **Thou shalt respond responsibly to praise and criticism alike**

   Social media gives rise to new mouth pieces for critics and advocates alike. Opinions, comments, etc. can appear in a manner of minutes and be re-posted or re-tweeted in seconds by hundreds of people. Communications & marketing professionals must be diligent to carefully consider how responses are crafted. Opinions and comments to posts need to be done in a productive way that sways the critics and enables supporters.

8. **Thou shalt engage in conversations with valuable insights**

   To win friends in communities and microblogs you must bring some value to the conversation. For instance, retweeting (RT) a post without any value added insights is not productive. Offering up your "spin" on the RT demonstrates that you've thought about the post and offered up what is hopefully a useful evolution to the story. This can be comical, analytical or advisory. The key is to jump in with some thoughtful insights.

9. **Thou shalt utilize social media as a complement to traditional influence vehicles**

   Utilizing Facebook communities or Twitter groups to drive traffic to your company's site or other social media vehicles (i.e. YouTube product videos) can be an effective complement to ongoing engagements with influencers. Creating contests, conducting polls, and harnessing crowdsourcing can make your contributions to these social media groups more impactful, and thus valuable to followers/friends.

10. **Thou shalt strive to become an authority/ambassador**

    Becoming an authority will grow your sphere of influence. Value + authority = influence. With influence comes more followers/friends, which are the underpinnings of success in social media circles.

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Conclusion

As noted at the outset of this paper. There is no "right" way to do social media, but our hope is that this playbook has given you some useful insights on how to employ the different tools to impact perceptions and cultivate new relationships. These tools are ever-changing and new outlets are cropping up every week. However, those highlighted above have a pretty loyal following and it's safe to assume they'll be around for awhile.

Engaging influencers with social media tools is very much time consuming, but by aggregating your feeds, monitoring tweets and community chatter you can find relatively easy ways to participate. Some top level guidelines to always keep in mind include:

- Avoid starting a new "party"; piggyback on existing online parties taking place on Facebook, Twitter, etc
- Avoid trying to force a new conversation; track ongoing conversations on fan pages, on Twitter and across blogs and join in where appropriate
- Make time each day to listen to the discussion
- Prioritization is critical as it will help you develop meaningful and lasting relationships with those who could impact your own identity as well as that of your company
- Don't be shy; get out there and contribute

We are still very much at the beginning of a new era of utilizing social media for marketing and communications. Social media (and 2.0 tools in general) allows individuals and companies to share and consume more information than ever before. Although it feels like the "wild west" out there, if you take the time to learn the tools, understand the nuance and the value that these new conversation outlets offer, you can help elevate yourself and your company as a thought leader.

Appendix I: Communities

Friendster

As one of the first movers in communities 2.0, Friendster really set the stage for making social networking a mainstream phenomenon. Friendster sought (and still prides itself on) to be the kindler, gentler social networking site. However, with new users looking for the newest fad – MySpace → Facebook – it has suffered from a lack of "cool" that fickle online users demand. That said, with more than 90M active users and 19B page views per month, it's safe to say that Friendster continues to be a relevant force in social networking.

LinkedIn

Billed as a professional network service, LinkedIn is basically a virtual business card. It was designed to enable professionals to showcase their credentials and allow them to connect with recruiters, colleagues and friends. The more "connections" you have the more popular a business person you are (so the theory goes). Unlike its more "social" brethren, LinkedIn is purposely more buttoned up. Over the years, LinkedIn has emerged as the prime space for professionals to find jobs and recruiters to tap into the growing number of unemployed professionals.

MySpace

With its flashy backgrounds, mood emoticons, video share feature, and customized bios, MySpace was an instant success with the millennials and music artists. Envisioned as a virtual space to make new friends, share multimedia, and discuss the trials of life, MySpace was a natural evolution of user forums and text-based listservs. While it continues to be a popular medium, it is having some difficulty with keeping users from migrating to the more sophisticated and massively popular Facebook. Comscore found that Facebook overtook MySpace in terms of worldwide users in April 2008.

Facebook

Took lessons from MySpace and designed a very nimble and organic interface that allows users to connect in new ways. Organized by city, region, school, Facebook users have a wide array of options for growing their networks. On the applications front, there is virtually no end to the apps that can be developed for making Facebook more fun and more social. Additionally, users can create groups, to which other users may belong. From pokes to the message Wall to news feeds, Facebook has set the standard for virtual communities.

Perhaps the most popular use of Facebook is status updates. These status updates are Twitter-esque micro blogs that allows users to keep their friends and family up to date. Given its original focus on students, it's not surprising that these status updates have become the Twitter for students. Indeed, more than 13M users update their status at least once every day. With notes, IM and Connect, more and more people are relying on Facebook as a one-stop shop for social interactions.

Digg

Although classifying Digg as a community is a bit of a stretch (it's really a news aggregator), its popularity has spawned a very loyal following of "diggers." It's a community in the sense that the value of content is left up to the "community" of diggers. Digg has grown significantly as more online users are moving from passive lurkers to becoming critics (Forrester Research found that the number of critics jumped to 35% of NA online adults). A quick comparison on Compete.com's site analytics tool shows that Digg's unique visitor traffic grew from under 20M users per month in Dec 2007 to around 35M in Dec 2008. For news and opinionated news, Digg's your best bet.

Appendix II: Other Tools

Aggregators

In a world of endless content, aggregators have become crucial to keeping ones sanity. Aggregators are invaluable time savers. Using aggregators, users can subscribe to any type of content feed (news, podcasts, blogs, etc.) to stay up to date on topics of interest. Really Simple Syndication (RSS) is perhaps the most familiar type of feed or channel. RSS is an XML-based family of Web feed formats that capture syndicated content and pushes it to a user-defined interface. The underlying value of aggregators is that they enable users to view content in one spot (vs. visiting multiple web sites).

Aggregators can be web-based or client-based. The former allow users to access their self-selected content from any device with an internet connection. Some popular web-based aggregators include Google Reader, Live.com, and Pageflakes. Alternatively, client-based aggregators are software installed on a users' PC, and captures feeds in a familiar user interface. Popular client-based aggregators include Feedreader (one of the first – 2001), Microsoft Outlook/Windows, Firefox and Hubdog.

One web-based aggregator that has gotten a lot of attention lately is Friendfeed. Founded by former Google employees, Friendfeed is a social media aggregator that allows users to "subscribe" to different feeds or friend channels. Unlike static aggregators/feeders, Friendfeed seems to be moving towards a hybrid feed/community environment.

Unbound by the constraints of 140 characters, Friendfeed also broadens the sphere of sharing while staying true to the informal brevity credo inherent in micro-blogging. Unlike Twitter, Friendfeed allows users to incorporate more content from other social media environments. You can tie your Flickr, Facebook, iGoogle, Twitter, blogs and countless applications into your Friendfeed environment. In a sense, it's Twitter on steroids.

Wikis

Wikis are tools that allow people to collaborate and share ideas. They can be used in business environments to brainstorm about a given project; by students who are working on an assignment for class; by parents who are responsible for coordinating the local soccer league; by government entities to enhance transparency with citizens and gather insights for shaping policy. The list goes on. Unshackled by geography, culture or devices, Wikis have redefined the way in which people collaborate. A Wiki can basically be developed for anything, but the pillar of the Wiki-world is Wikipedia.

Wikipedia is a multilingual, Web-based, free content encyclopedia project. Since its creation in 2001, Wikipedia has grown rapidly into one of the largest reference Web sites, attracting at least 684 million visitors yearly. The primary role of contributors is to write articles that cover existing knowledge. This means that people of all ages and cultural and social backgrounds can contribute to Wikipedia articles.

Most of the articles can be edited by anyone with access to the Internet, simply by clicking the "edit this page" link. Anyone is welcome to add information, cross-references or citations, as long as they do so

within Wikipedia's editing policies and to an appropriate standard. Substandard or disputed information is subject to removal. The Wikipedia Policies and Guidelines page is a good place to begin if you wish to add content to the site.

Appendix III: Additional Resources

Brian Solis (great update on growth of Twitter and Facebook as conversation mediums)

Groundswell (seminal book written by Charlene Li and Josh Bernoff)

Scot Monty (Social media and you; good overview of how he's using social media at Ford)

Born Digital (informative book on the digital natives' mindset by John Palfrey and Urs Gasser)

Ping.fm

Ping.fm automates status updates across social networking sites. Like an aggregator, Ping.fm saves time by collapsing social notices into 140 character updates. As users join more social networks, services like Ping.fm will continue to grow in popularity.

Soapbox

Soapbox on MSN Video is an internet video-sharing service from Microsoft via its MSN portal. Users who wish to upload content are required to sign up for a Windows Live ID. Soapbox on MSN Video differs from other video sites by offering features such as RSS and same window browsing and uploading. It is important to note that responses to videos are also allowed unless the video publisher turns that option off. Due to the broad nature of YouTube usage, it is generally considered appropriate to turn off the option for responses, thereby avoiding negative coverage. View MSN's help topic for uploading video.

YouTube

YouTube is a video sharing website where users can upload, view and share video clips. Started in 2005 by three former PayPal employees, the San Bruno-based service was purchased by Google in November of 2006. As of Q1 2008, YouTube is not profitable, with its revenues being noted as "immaterial" by Google in a regulatory filing. Its bandwidth costs are estimated at approximately $1 million a day. It is estimated that in 2007, YouTube consumed as much bandwidth as the entire Internet in 2000, and that around ten hours of video are uploaded every minute.

Unregistered users can watch most videos on the site, while registered users are permitted to upload an unlimited number of videos. Related videos, determined by title and tags, appear onscreen to the right of a given video. It is important to note that responses to videos are also allowed unless the video publisher turns that option off. Due to the broad nature of YouTube usage, it is generally considered appropriate to turn off the option for responses, thereby avoiding negative coverage. For documentation on how to produce and upload videos, you may wish to review YouTube's handbook.

Live Spaces

Windows Live Spaces (also known by its users as MSN Spaces) is Microsoft's blogging and Social Networking platform. The site was originally released in early 2004 under the MSN Spaces name. Windows Live Spaces received an estimated 27 million unique visitors per month as of August 2007. Several "gadgets" are available for Windows Live Spaces users that allows for greater customization of an individual's space. Contact Cards, which summarize recent additions to a Windows Live Space for a particular user, are integrated with Windows Live Messenger, MSN Web Messenger and Hotmail Contacts. In order to obtain a Windows Live Space, a user must register or already be registered for a Windows Live ID account. For more information about Windows Live Spaces, visit Windows Live Help Central.