

# SOCIAL MEDIA MARKETING

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**Workbook  
2018**

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**JASON McDONALD**



SOCIAL MEDIA MARKETING  
WORKBOOK:  
HOW TO USE SOCIAL MEDIA  
FOR BUSINESS

2018 EDITION

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“The perfect is the enemy of the good.” – Voltaire

# CONTENTS

0.	<b>INTRODUCTION</b>	PG.	5
1.	<b>PARTY ON – SOCIAL MEDIA MARKETING</b>	PG.	19
2.	<b>CONTENT MARKETING</b>	PG.	41
3.	<b>FACEBOOK</b>	PG.	67
4.	<b>LINKEDIN</b>	PG.	119
5.	<b>TWITTER</b>	PG.	165
6.	<b>INSTAGRAM</b>	PG.	201
7.	<b>YOUTUBE</b>	PG.	245
8.	<b>PINTEREST</b>	PG.	285
9.	<b>YELP, GOOGLE MY BUSINESS, &amp; REVIEWS</b>	PG.	311
10	<b>EPILOGUE</b>	PG.	357



# 0

# INTRODUCTION

Welcome to the *Social Media Marketing Workbook*, 2018 updated edition! With a complete fact-checking of all available tips, tricks, and features plus new quizzes for each Chapter, get ready to:

- Have some **fun**.
- **Learn how Social Media works**.
- Understand how to use **Social Media to market your business**.
- Create a step-by-step **Social Media Marketing plan**.

Fully revised and updated, this workbook not only explains how to market on social media (from Facebook to LinkedIn, YouTube to Pinterest, Instagram to Twitter to Yelp and back again) but also provides access to **free social media marketing tools**. It provides overviews, step-by-step instructions, tips and secrets, resource tips and free tools for social media marketing, and access to step-by-step **worksheets** and **videos** that will help you market your product, service, or business on social media.

## Free Tools

Even better, if you register your copy, you also get access to my complete *Social Media Toolbook* and *Dashboard*, with literally hundreds of **free social media marketing tools** to turbocharge your social media marketing not just on Facebook but also on LinkedIn, Twitter, YouTube, Google+, Instagram and other major social media platforms.

*It slices, it dices. It explains how social media works. It gives you free tools. And it helps you make a social media marketing plan.*

## Why Market via Social Media?

If you own a business or work as a marketing manager at a business, you're probably intrigued by **social media** as a **marketing platform**. Hardly a day goes by that the "traditional" news media doesn't talk about Twitter, Instagram, Snapchat, Facebook, or YouTube, often in the context of some new way to reach customers and build buzz. Between TV shows like *Ellen* or radio shows like *Marketplace* encouraging you to "like" them on Facebook, or your next door neighbor or perhaps a business competitor bragging about their latest tweet or "Stories" upload to Instagram, it seems like everyone is promoting their Facebook Page, their YouTube channel, their reviews on Yelp, or encouraging you to check them out on Snapchat. What do they understand that you don't get? Or, even if you get a lot, what are secret tips and tricks that can improve your marketing even further? Social media is everywhere, and yet it can seem very confusing to the uninitiated. What is this *magical marketing* being conducted on *social media*, and how does it work?

## Let's Talk about You

Let's talk about you for a moment. Perhaps you own a small business, perhaps you're the marketing manager at a mid-size company producing ball bearings, or perhaps you are an ad agency guru charged with setting up a Facebook plan for a local non-profit. It's easy to be overwhelmed, and natural to feel like you're not sure how to market on social media. Perhaps you're just starting out with a **Facebook Page** for your **business**, or perhaps you've seen your teenager spend hours on **Instagram** or **Snapchat**, or you realize that the female, shopping demographic is "on" **Pinterest**. Perhaps the hip coworker dressed in black or one of his friends has looked down on you, condescendingly, when you don't understand the difference between a *hashtag* and a *retweet*. Or you've painfully learned that **Yelp** or **Google** reviews can make (or break) your business, only after an unhappy customer has trashed you online. Social media, after all, is all around us in today's 24/7 desktop, tablet, and mobile phone environment, and it does not seem to be simple!

Maybe you have already attempted a Facebook Page, a YouTube Channel, or a Pinterest board, but it hasn't really worked out. "How does social media really work?," you wonder. "What's all the fuss about, and can it really bring in customers and make sales?"

*Don't worry. Enter the Social Media Marketing Workbook to the rescue, with step-by-step instructions on how to market on each social media network plus a conceptual framework so you actually understand the nature of marketing itself.*

This book will explain the “how” – a step by step, systematic method to effective social media marketing. But before we dive in to the “how,” let’s step back for a minute and ask the “why”:

### **Why market on social media?**

Here are some reasons why **social media marketing** is valuable:

- **Social media is big.** Facebook, the largest social media platform, has nearly two billion users worldwide and climbing; LinkedIn with over 450 million members is “the” network for B2B marketers. Every minute 300 hours of video are uploaded to YouTube, and nearly everyone goes to Yelp or Google+ to check out reviews on local businesses.
- **Your customers are on social media.** Nearly everyone uses Facebook – from teenagers to grandmas, business executives to flight attendants. Most professionals have at least a LinkedIn profile. Everyone reads reviews online, many post pictures to Instagram, etc. *Fish where the fish are.* By participating in social media, you can reach your customers where they “hang out.”
- **Social media is free.** Facebook, Yelp, Snapchat, YouTube, Instagram, Pinterest... are, of course, free to use. Users love them because “for free” they get access to their friends and family, plus information on brands that they love. And in terms of marketing there is a lot you can do, for free, to build your brand, spread eWOM (electronic word of mouth), help you stay top-of-mind with your customers, and even “get shares” or “go viral.” (*Free, as we will learn, does not mean easy or no hard work involved – more on that later!*)
- **Social Media can reach not only existing but also new customers.** Between organic (“free”) and paid reach on sites like Instagram, Facebook, YouTube or Twitter, you can not only stay in touch with your existing customers, you can also be discovered by new customers. Unlike on search engines like Google (where customers must pro-actively look for you), on social media you can be discovered as customer No. 1 shares information with customer No 2. You can also be discovered not when a customer is pro-actively searching for you but when he just happens to be checking his Facebook news feed, or browsing photos on Instagram. Hashtags – the *#trendingtopics* that occur especially on Instagram and

Twitter – are yet another way to reach people who aren't proactively looking for your product or service.

## **Social Media (Seems) Complicated**

Social media, however, is also **complicated**. First of all, *using* social media is one thing, and *marketing* on social media is another. That snappy teenager might understand how to *use* Snapchat, but this doesn't mean she knows how to *market* on it. Even many experienced marketers are befuddled, as their knowledge of traditional marketing channels does not translate easily to social media networks like Instagram or Twitter. Indeed, many businesses simply fail at social media marketing, either doing nothing or spinning their wheels with endless busy work. They don't understand how social media works, and they fail to see the incredible marketing opportunities beneath the surface of this huge but messy brave new world of marketing. Quite simply, you have to invest some time to learn “how” to market on social media

Fortunately, you hold in your hand (or at least hold it virtually in your Kindle or PC), the *Social Media Marketing Workbook*, a workbook that helps you understand the “how” of marketing your business on social media. You've joined that elite group of people who have taken the most important step: proactively seeking to educate themselves on how to market via this new world order.

## **Who is This Workbook For?**

This workbook is aimed primarily at **small business owners** and **marketing managers**. **Non-profits** will also find it useful. If you want to build buzz around your company or brand, increase your sales or sales leads, or expand your reach from your most loyal customers to their friends and family, and to the friends and family of those friends and family, this workbook is for you.

If you are a person whose job involves advertising, marketing, and/or branding, this workbook is for you. If you are a small business that sees a marketing opportunity in social media of any type, this workbook is for you. And if your job is to market a business or organization online in today's Internet economy, this book is for you. Anyone who wants to look behind the curtain and understand the mechanics of how to market on social media (from Facebook to LinkedIn, Twitter to Yelp, Pinterest to YouTube and beyond) will benefit from this book.

Anyone who sees – however dimly – that social media could help market their business will benefit from this hands-on workbook.

### How Does This Workbook Work?

This workbook starts first with an overview to **social media marketing**. Beyond the positive “can do” attitude that you already have (if you’ve read this far, or purchased this book), the next most important asset is a “mental model” of what social media is, and how it can be used to market to your customers. It’s simple. If social media is a **party**, then **using social media** is akin to just *showing up at a party*. **Marketing** on social media, in contrast, isn’t about showing up. It’s about **throwing** the party!

Understanding that distinction between “attending” the social media party and “throwing” the social media party is the subject of **Chapter One**.

## SOCIAL MEDIA MARKETING = THROWING GREAT “ONLINE PARTIES”

**Chapter Two** is the next most important concept: **content marketing**. You need wonderful food and entertainment to keep your party going, and content is the “food and entertainment” of social media marketing. Accordingly, Chapter Two will explain to you how to setup and maintain a content production machine to feed all your social channels.

**Chapters Three through Nine** are deep dives into social media marketing, one medium at a time. We’ll start, for example, with **Facebook**. First, we’ll provide an overview to how Facebook works, explain everything from profiles to pages, likes to comments to shares, Edgerank to posting rhythm. It will all become much clearer, as we work through Facebook in plain English, written for “mere mortals.” Along the way, I’ll provide **videos** and **worksheets** that will act as “Jason as therapist,” so you can fill them out and begin to outline your own unique Facebook marketing plan. I know, calm yourself down, as you’re probably wondering if there are **quizzes** to test your knowledge. There are! New for 2018 are Chapter quizzes where you can test your knowledge and generate a nifty certificate suitable for framing and/or to place on your refrigerator. My goal is for you to not only *understand* Facebook marketing but actually to begin to *do* marketing on Facebook. Ditto for LinkedIn, Twitter, Instagram, YouTube, and the rest of the gang.

## Table of Contents

1. **Party On – Social Media Marketing** – an overview to social media marketing at a conceptual level. Pg. 19
2. **Content Marketing** – how to conceptualize the type of content you need for your social media marketing efforts and build a content production machine. Pg. 41.
3. **Facebook** – how to market your business on Facebook including some basic principles of Facebook advertising. Pg. 67
4. **LinkedIn** – how to use the world’s largest B2b network for your business, including advertising opportunities. Pg. 119
5. **Twitter** – an explanation of whether you should tweet, and if you do, how to use Twitter effectively for business marketing. Pg. 165
6. **Instagram** – how Instagram is like Twitter with pictures, how to market on Instagram, and even a brief comparison to Snapchat. Pg. 201
7. **YouTube** – a deep dive into the business side of YouTube, often hidden behind cat videos and Rihanna or Lady Gaga gyrations gone viral. Pg. 245
8. **Pinterest** – the most effective social media for eCommerce stores and retailers, do-it-yourselfers, and those serving the female shopping demographic such as wedding photographers. Pg. 285
9. **Yelp, Google My Business, and Reviews** – how the “Review Revolution” is impacting local businesses, and how to use Yelp, Google My Business (formerly Google+), and other review sites to promote your business via reviews. Pg. 311
10. **Epilogue** – the “new” new kids on the block: Snapchat, Tumblr, Medium, and new ways to go social and go marketing. Pg. 357

## Use the Internet to Master the Internet

Finally, this workbook is meant to leverage the power of the Internet. Register your copy online to get a PDF copy of this book (with clickable links to make it easy to access online resources), and a complimentary copy of my *Social Media Toolbook*, a compilation of hundreds of social media tools not just for Facebook, LinkedIn, Twitter, etc., but for all the major platforms as well as pointers to learning resources for even more fun in the world of social media. You’ll also get free access to my *Social Media Dashboard*, my absolute favorite free tools all set out for you to use in easy click-to-go format.

Here's how to **register** your copy of this workbook:

1. Go to **<http://jmlinks.com/workbooks>**
2. Click on *Social Media Workbook 2018*.
3. Use this password: **2018social**
4. You're in. Simply click on the link for a PDF copy of the *Social Media Toolbook* as well as access to the worksheets referenced herein.

Once you register, you get access to –

- **A PDF copy of this book.** Read it on your PC or tablet, and the links referenced in the book become clickable. This is a great way to extend the book into the myriad resources such as example websites or social media pages, FAQ's, support or help from the major vendors, and videos.
- **My social media marketing dashboard** – an easy-to-use, clickable list of the best tools for social media marketing by category (e.g., Facebook tools, Twitter tools, etc.).
- **The *Social Media Toolbook*** – a collection of up-to-date social media tools in detail. While the *Dashboard* identifies my favorites, the *Toolbook* compiles the universe of free social media tools.
- **Videos** – an extensive collection of “how to” videos. You can browse them directly on my YouTube channel at **<https://www.youtube.com/jmgrp>**.
- **Quizzes** – an easy way to test your knowledge and reinforce what you're learning. The devil is in the details, and the quizzes test your devilish knowledge medium-by-medium.

## Jump Codes

Throughout the book, I reference the website **<http://jmlinks.com/>** plus various “jump codes.” If you're reading in PDF format, the links are clickable. If you're reading in hard copy or on the Kindle, I advise you to fire up your Web browser, bookmark **<http://jmlinks.com/>** and then enter the codes.

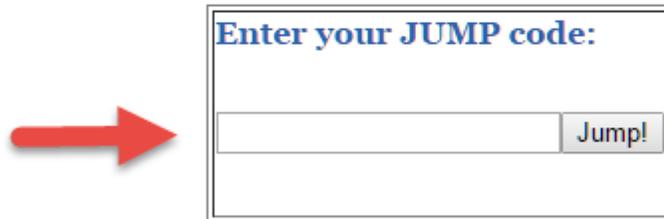
Here's a screenshot:

# Search Engine Optimization, Social Media Marketing, and AdWords

## Book Links

**Welcome!** My name is [Jason McDonald](#) and I provide consulting services in Internet marketing: SEO, AdWords, and Social Media Marketing.

### BOOK JUMP CODES



The image shows a red arrow pointing to a rectangular form box. Inside the box, at the top, is the text "Enter your JUMP code:". Below this text is a single-line text input field. To the right of the input field is a button labeled "Jump!".

If you've landed here... you must be looking for links in my books on SEO, AdWords, and/or Social Media Marketing. In each of the books, there should be numeric links that will automatically forward you to important links on the Internet.

You should know the 'secret' URL. If not, send me an email by clicking on the box to the left. Be sure to mention the class or workshop which you attended and the date.

For example, <http://jmlinks.com/16s> would mean first go to <http://jmlinks.com/> and enter "16s" in the jump code box. Your browser will then "jump" you to the referenced resource.

**VIDEO.** Watch a video tutorial on how to use "jump" codes at <http://jmlinks.com/jump>.

OK, now that we know what this workbook is about, who it is for, and our plan of action...

**Let's get started!**

## » MEET THE AUTHOR

My name is Jason McDonald, and I have been active on the Internet since 1994 (*having invented the Internet along with Al Gore*) and taught SEO, AdWords, and Social Media since 2009 – online, at Stanford University Continuing Studies, at both AcademyX and the Bay Area Video Coalition in San Francisco, at workshops, and in corporate trainings across these United States. I love figuring out how things work, and I love teaching others! Social media marketing is an endeavor that I understand, and I want to empower you to understand it as well.

Learn more about me at <https://www.jasonmcdonald.org/> or at my corporate website <https://www.jm-seo.org/>. Or just call 800-298-4065, say something flattering, and my secretary will put you through. (*Like I have a secretary! Just call if you have something to ask or say*). Visit the websites above to follow me on Twitter, connect with me on LinkedIn, or like me on Facebook. *Sorry my Snapchat feed is so crazy it's for friends and family, only.*

## Take My Classes

I teach both online and face-to-face on the Stanford Campus. If you'd like to learn more, or get an email alert when registrations are open, visit <https://jmlinks.com/classes>. The classes build on the books and focus on practical, hands-on knowledge for SEO and Social Media Marketing successes.

## » SPREAD THE WORD: TAKE A SURVEY & GET \$5!

If you like this workbook, please take a moment to take a short **survey**. The survey helps me find errors in the book, learn from student questions, and get feedback to improve future editions of the book. Plus, by taking the survey, I'll be able to reach out to you and we can even become friends. Or, if not friends, at least friends on the Internet or Facebook which isn't quite the same thing, but still it's pretty good.

Here's how –

1. Visit <http://jmlinks.com/survey>.
2. Take a short **survey** about the book.
3. I will rebate you \$5.00 via Amazon gift eCard.

How's that for an offer you can't refuse?

This offer is limited to the first 100 participants, and only for participants who have purchased a paid copy of the book. You may be required to show proof of purchase and the birth certificate of your first born child, cat, or goldfish. If you don't have a child, cat, or goldfish, you may be required to prove telepathically that you bought the book.

## » QUESTIONS AND MORE INFORMATION

I **encourage** my students to ask questions! If you have questions, submit them via <http://jmlinks.com/contact>. There are two sorts of questions: ones that I know instantly, for which I'll zip you an email answer right away, and ones I do not know instantly, in which case I will investigate and we'll figure out the answer together.

As a teacher, I learn most from my students. So please don't be shy!

## » COPYRIGHT AND DISCLAIMER

I knew you just couldn't wait for the legal stuff. *Calm yourself down, and get ready for some truly fun reading.*

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That's a *good thing*. This workbook is **independent**. My aim is to "tell it as I see it," giving you no-nonsense information on how to succeed at social media marketing.

In addition, please note the following:

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The information used in this workbook was derived at the time of publication. However, social media marketing changes rapidly, so please be aware that scenarios, facts, and conclusions are subject to change without notice.

**Additional Disclaimer.** Internet marketing is an art, and not a science. Any changes to your Internet marketing strategy, including SEO, Social Media Marketing, and AdWords, are at your own risk. Neither Jason McDonald, Excerpti Communications, Inc., nor the JM Internet Group assumes any responsibility for the effect of any changes you may, or may not, make to your website or social media marketing based on the information in this workbook.

**Additional Additional Disclaimer.** Please keep your arms and legs in the vehicle at all times, be kind to one another, and do not cut other people off while driving. Please remember that everything you say and do, online, becomes part of your digital footprint, and when aliens download the digital records of earth in the year 2027, you'll either be remembered as a kind person or a jerk. Choose to be kind.

## » ACKNOWLEDGEMENTS

No man is an island. I would like to thank my beloved wife, Noelle Decambra, for helping me hand-in-hand managing our busy household and raising two wonderful girls, and as my personal cheerleader in the book industry. Gloria McNabb has done her usual tireless job as first assistant, including updating this edition as well the *Social Media Marketing Toolbook*. I would also like to thank my black Labrador retriever, Buddy, for countless walks and games of fetch, during which I refined my ideas about marketing and about life.

I'd like to thank my two daughters, Hannah and Ava, and especially Ava who as a budding YouTube star has found the patience to explain Snapchat to me at least three times.

And, again, a huge thank you to my students – online, in San Francisco, and at Stanford Continuing Studies. You challenge me, you inspire me, and you motivate me!





# 1

# PARTY ON

Most books on **social media marketing** (or **SMM** for short) either focus on the high, high level of over-the-top hype or focus on the in-the-weeds level of micro technical details. It's either Malcolm Gladwell's *Blink*, Seth Godin's *Purple Cow*, David Meerman Scott's *The New Rules of Marketing and PR* – or it's *Social Media for Dummies*, *LinkedIn for Dummies*, or *Teach Yourself Facebook in Ten Minutes*.

**You're either up in the sky, or lost in the weeds.**

This book is different: it focuses on the middle, productive ground – part **theory**, and part **practice**. It gives you a framework for how to “think” about social media marketing as well as concrete advice on how to “do” social media marketing on each particular network.

Throughout, it provides worksheets, videos, quizzes, **TODOs**, and deliverables, to help you create a step-by-step **social media marketing plan** as well as a step-by-step LinkedIn marketing plan, Twitter marketing plan, etc. Used in combination with the *Social Media Toolbook* and *dashboard*, which identify hundreds of **free** tools for social media marketing all in one convenient place, small business owners and marketers finally have a practical, hands-on method for social media marketing.

This first chapter is about *how to think about social media marketing*. What is social media marketing? Why are you doing it? What should you do, step-by-step, to succeed?

**Let's get started!**

## **TODO LIST:**

- » Understand that Social Media Marketing is Like Throwing a Party
- » Recognize the Social Media Marketing Illusion
- » Identify Relevant Discovery Paths

» Establish Goals and KPIs

»» Checklist: Social Media Marketing Action Items

»» Deliverable: a “Big Picture” Social Media Marketing Plan

## » UNDERSTAND THAT SOCIAL MEDIA MARKETING IS LIKE THROWING A PARTY

Have you ever **attended** a party? You know, received an invitation, showed up, said hello and various meets and greets to other guests, ate the *yummy yummy* food, drank the liquor (or the diet soda), hobnobbed with other guests, ate some more food, danced the night away, thanked the hosts, and left?

*Attending* a party is all about *showing up, enjoying* the entertainment and food, and *leaving*.

Have you ever **used** Twitter? Facebook? Instagram? You know, logged in, checked out some funny accounts, read some posts, posted back and forth with friends and family, checked your updates, and then logged out?

That's *attending* a party. That's *using* social media.

*Using* social media is all about *logging in, enjoying* what's new and exciting, and *logging out*.

**Throwing** a party, however, is something entirely different from **attending** a party. Similarly, **marketing** via social media is something entirely different from **using** social media.

This chapter explores the basics of social media *marketing*: of **throwing** the “social media party” vs. just **showing up**. That word *marketing* is very important: we're exploring how to use social media to enhance our brand, grow the visibility of our company, product or service, or even (gasp!) use social media to sell more stuff.

# PARTY ON: BECOME A GREAT PARTY-THROWER

Social media marketing is the art and science of throwing “great parties” on Twitter, Facebook, LinkedIn, Pinterest and the like in such a way that people not only show up to enjoy the party but also are primed to buy your product or service.

Let’s explore this analogy further: how is social media *marketing* like *throwing a party*?

Here are three ways:

**Invitations = Promotion.** A great party needs great guests, and the first step to getting guests is to identify an attendee list, and send out invitations. Who will be invited? How will we invite them – will it be by phone call, email, postal mail, etc.? For your social media marketing, you’ll need to identify your target audience(s) and brainstorm how to get them to “show up” on your social media page via tactics like sending out emails, cross-posting your Facebook to your Twitter, or your LinkedIn to your blog, advertising, or even using “real world” face-to-face invitations like “Hey, follow us on Twitter to get coupons and insider deals.”

***Social media marketing requires having a promotion strategy.***

**Entertainment = Content.** Will your party have a band, a magician, a comedian, or just music? What is your entertainment strategy? What kind of food will you serve: Mexican, Chinese, Tapas, or something else? Similarly for your social media marketing: why will people “hang out” on your Facebook page or YouTube channel? Will it be to learn something? Will it be because it’s fun or funny?

***Social media marketing requires having a content marketing strategy, a way to systematically produce yummy yummy content (blog posts, infographics, images, videos) that people will enjoy enough to “hang out” on your social media page or channel.***

**Hosting =-On-going Management.** As the host of your party, you'll "hang out" at the party, but while the guests are busy enjoying themselves, you'll be busy, meeting and greeting, making sure everything is running smoothly, and doing other behind-the-scenes tasks. Similarly, in your social media marketing, you'll be busy coordinating content, interacting with guests and even policing the party to "kick out" rude or obnoxious guests.

*Social media marketing requires behind-the-scenes on-going management, often on a day-to-day basis, to ensure that everything is running smoothly up to and including dealing with "rude" guests.*

## SOCIAL MEDIA MARKETING IS THROWING A PARTY ONLINE

In addition, you want to think like a "party detective." Let's assume, for example, you're going to throw your spouse an amazing 40<sup>th</sup> birthday party. Before that party, you'll probably start attending other parties with a critical eye – noting what you like, and what you don't like, what you want to imitate, and even reaching out to the magicians, bands, and bartenders to find out what they cost and possibly hire them for your own party.

### **Inventory Other Parties**

You'll "inventory" other parties and make a list of likes and dislikes, ideas and do-not-dos, and use that information to systematically plan your own party.

As a social media marketer, therefore, you should "attend" the parties of other brands online. Identify brands you like (REI, Whole Foods, Bishop Robert Barron), "follow" or "like" them, and keep a critical eye on what they're doing. **Inventory** your likes and dislikes, and **reverse engineer** what other marketers are up to. And in your industry, do the same: follow companies in your own industry, again with the goal of "reverse engineering" their social media marketing strategy, successes, and failures.

For your first **TODO**, identify some brands you admire and “follow” them on Twitter, LinkedIn, Facebook, Pinterest etc. Start making a list of what you like, or dislike, based on reverse engineering their online marketing strategy. Become a good user of social media, but with an eye to the marketing strategy “behind the scenes.” Here are the steps:

1. **Log in** to your **social media account** (e.g., Twitter or Facebook).
2. Using the search function, **search for keywords** that are relevant to your business. If you are a wedding planner, for example, search for keywords such as ‘wedding planning’ or ‘weddings’ or ‘party planners.’
  - a. You can use a special Google search of `site:network` as in `site:facebook.com` “accounting firms” to use Google to rapidly find interesting items on any social media site. Note: there is NO SPACE between the : and the network. Visit <http://jmlinks.com/12v> to see this in action. You can also watch a **video** on this at <http://jmlinks.com/16g>.
  - b. Use the *Social Media Marketing dashboard* > *keyword tools* to research keyword “themes” around which your customers search and talk. Imagine a water cooler conversation by your customers on theme X or theme Y – identify which topics are relevant on social. Visit <http://jmlinks.com/smmdash> > keyword tools to begin.
3. Write down or **bookmark accounts that you find**. If you search for “hamburgers,” and you find the Facebook page of the Palo Alto restaurant, “The Counter,” then “like” that Page on Facebook and/or bookmark it. You’ll need a list of five to ten companies that are like yours and/or that you can see are doing a good job on the platform.
4. Begin to **inventory** what you **like** and **dislike** about how they are running their social media effort. For Facebook, do you like their cover photo? Why or why not? Do you like their profile pictures? What about what they post, and how frequently? Imagine you are attending their party not “to have fun,” but to “reverse engineer” how they are putting it on. Write this down on a spreadsheet or document.

## **A Party with a Purpose**

Let’s talk for a moment about how social media marketing is like throwing a *party with a purpose*. While the birthday party you’re throwing for your spouse on her 40<sup>th</sup> birthday is hopefully just a labor of love with no ulterior motive, the corporate parties I’ve gone to here in Silicon Valley are not without a purpose. You may show up at the Mentor Graphics party at the *Design Automation Conference*, or the Analog Devices event at the *Consumer Electronics Show*, eat their food, drink their liquor, and enjoy their entertainment, but they want something in return. They want you – as the party goer – to listen to a spiel by their CEO or product marketing manager on their latest product, they want you to get a

“warm and fuzzy feeling” about their brand, and they want you to think of them the next time you’re ready to purchase something. Like a Silicon Valley corporate event, your social media marketing “party” is a party with a purpose.

It’s generally one of two things:

- Build your **brand equity** among your target customers, giving them a warm and fuzzy feeling that they “like” your brand so much they’ll be favorably inclined to buy your product and/or service; or -
- **Get a sale**, by selling your product or service right then and there.
  - Or, a few steps before the sale, a goal might be to get a sign up to an email newsletter, or a **sales lead / registration** from a free ebook or software download offer, etc. The “goal” of social media marketing can be to “acquire sales leads” in the form of names, company names, email addresses, phone numbers, etc., in exchange for “something free” like a software download, free eBook or free consultation.

Whether you’re subtle about it (*just get that warm and fuzzy feeling*), or you’re aggressive about it (*act now, and get a special discount for following us on Twitter*), your social media “party with a purpose” isn’t exactly the same as a family party or gathering. You want something from your attendees: more money, more sales, and better brand equity.

As you begin to pay attention to competitors and brands that seem to “get” social media, I want you to be just a bit cynical, and look for the “purpose” behind their “parties with a purpose” on Twitter, Facebook, LinkedIn, Snapchat, and the like. What’s in it for them, and how do they blend this purpose into their “oh so fun” parties on social media?

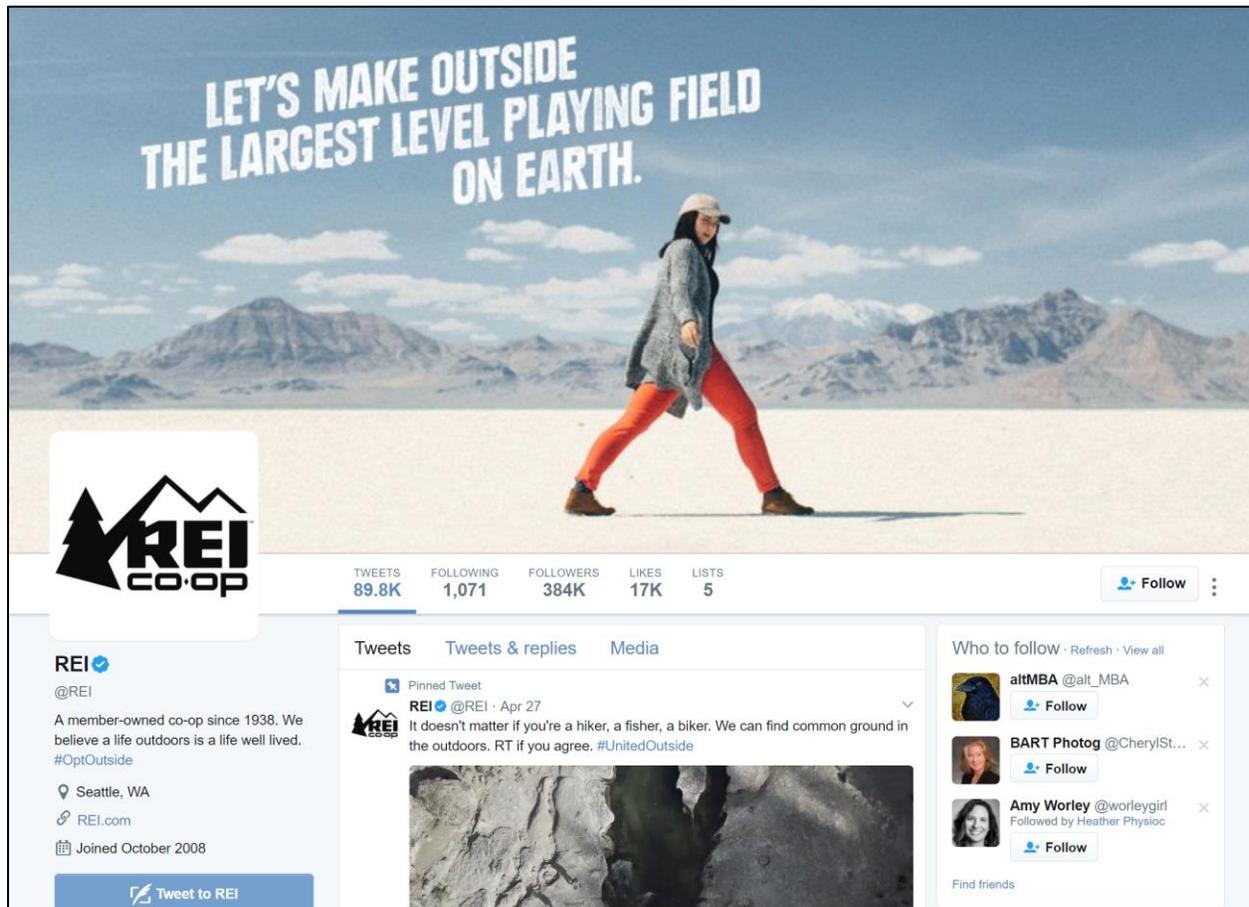
And start to think about social media marketing in terms of “what’s in it for you” as a business or marketer.

**Question:** What do you want to get out of your “party with a purpose?”

### **A Brand Example: REI**

For example, I love the brand REI, which is a sporting goods company. I love it not so much because I am a big outdoors person (I’m not), but because they do an awesome job

on social media. Here's a screenshot of their Twitter account, showing that they have 384,000 followers on Twitter:

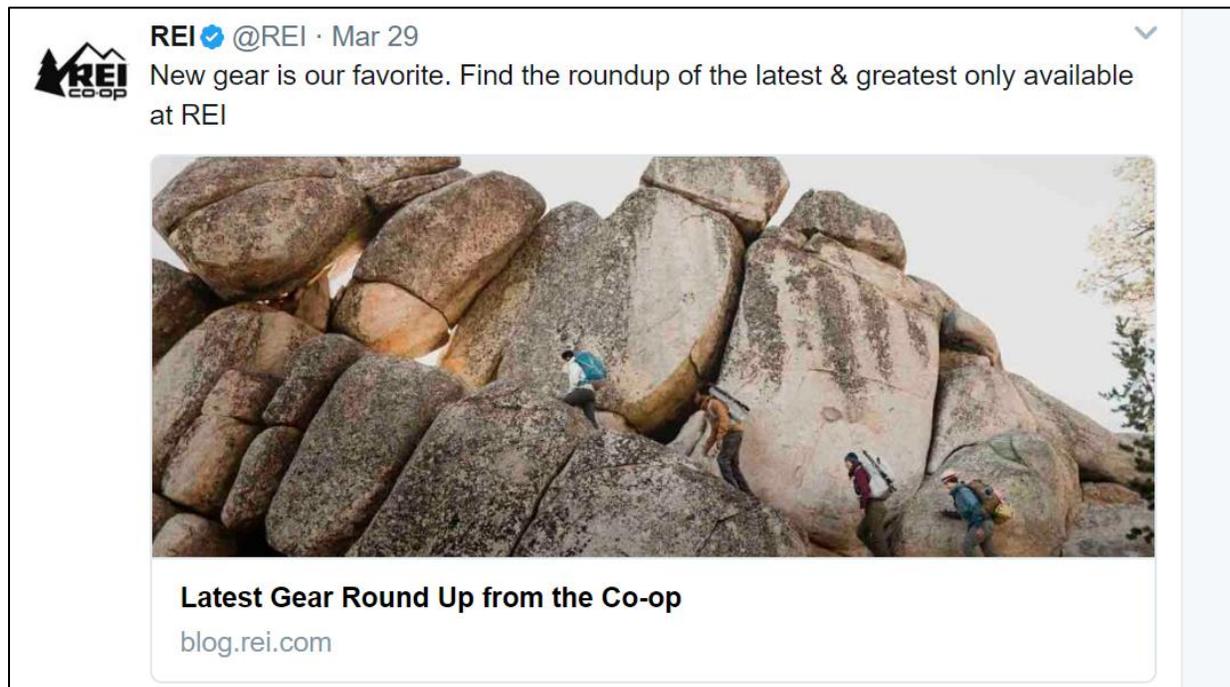


Pay attention to REI's posts on Facebook, Twitter, and Instagram, and you'll notice two types:

**Fun Posts.** These are posts either by REI or by users that seemingly share their passion for the outdoors and for outdoor equipment. These are probably more than 90% of their posts. **Purpose:** build positive brand equity.

**Buy Our Stuff Posts.** These are posts which, much more shamelessly, connect the social media experience with an “act now!” feature to encourage a user to skedaddle on over to REI.com and buy something. These are probably less than 10% of their posts. **Purpose:** get people to buy their stuff.

For example, here’s a “buy our stuff” tweet that shares a “roundup” of new gear available for spring, 2017:



Don’t get me wrong. There’s nothing unethical about this post; it links to a blog round up with shoppable links to their eCommerce store. But compared with most of their posts (which focus on building up positive brand equity), this post is just a bit more *shameless* and direct towards “buy our stuff.”

You almost won’t notice it, until you do. REI is throwing a “party with a purpose,” but doing so in such a wonderfully fun, engaging way that it’s not in-your-face or obnoxious. But it is there. They want you to buy more REI products, either *indirectly* because you “like” their brand and have positive feelings about them, or *directly* because you’ve seen a tweet, a Facebook post, or something on Instagram that pulls you directly into their eCommerce store.

In summary, REI isn’t on Twitter, Facebook, Instagram, and Snapchat “just for fun.” They have a marketing purpose: build their brand, and (ultimately) get people to buy their stuff.

## Find and Reverse Engineer Companies that Do Social Media Well

Your task is to go on Twitter, Facebook, Instagram, LinkedIn, and identify companies that intrigue you. “Like” or “follow” them and start to think about their social media marketing “as if” you were attending their “party.” Look for the “purpose” behind their parties, and how they blend this “purpose” into their social media posts. And, in addition, you have an ulterior motive of your own: to “reverse engineer” how they are throwing such great parties, and how you can use that knowledge to improve your own “party with a purpose.”

Welcome to *Spy vs. Spy*, social media edition.

### » RECOGNIZE THE SOCIAL MEDIA MARKETING ILLUSION

As you begin to identify and monitor brands that you like on a given social media platform, you may be tempted to conclude that it’s either really easy or they are just geniuses. Successful social media is based on **illusion**, just like successful parties are based on illusion.

How so?

Let’s think for a second about an amazing party. Think back to a holiday party you attended, a great birthday or graduation party, or even a corporate event. Was it fun? Did it seem magical? It probably did.

Now, if you’ve ever had the (mis)fortune of planning such an event – what was that like? Was it fun? Was it magical? Yes and no, but it was also probably a lot of work, “in the background,” to make sure that the party ran smoothly.

### The Party Illusion

Great parties have an element of **illusion** in them: they *seem* effortless, while *in reality* (behind the scenes) an incredible amount of strategy, planning, and hard work goes on. Similarly, great social media marketing efforts (*think Katy Perry or Lady Gaga on YouTube, think Whole Foods on Facebook or blogging, Airbnb or Aeromexico on Instagram, or REI, Zappos, Burt’s Bees, or even Nutella on Twitter*), create an illusion. They (only) “seem” spontaneous, they (only) “seem” effortless. But in the background a ton of work is going on to promote, manage, and grow these “social media parties.”

# ILLUSION IS COMMON TO GREAT PARTIES AND GREAT SOCIAL MEDIA MARKETING

With respect to social media marketing, this **illusion phenomenon** often creates a weird problem for you vis-a-vis upper management or your boss. Upper management or your boss might mistakenly believe that “social media is easy,” and/or “social media is free.” You, as the marketer, might have to educate your boss that it only “looks” easy, or “seems” free. Social media marketing requires a ton of strategy, hard work, and (gasp!) even money or sweat equity to make it happen. Among your early tasks at social media marketing may be to explain the “social media marketing” illusion to your boss.

*It only seems easy. It only seems free.*

For your second **TODO**, organize a meeting with your boss and/or marketing team. Discuss all the things that have to get done to be successful at social media marketing, ranging from conducting an **inventory** of competitor efforts, to **setting up basic accounts** on Twitter, Facebook, Instagram, LinkedIn, etc., to **creating content** to share on social media (images, photos, blog posts, infographics, videos), to **monitoring** social media channels on an on-going basis, and finally to **measuring** your successes. Educate the team that although it might not take a lot of money, social media marketing does take a significant amount of work!

*We’re planning an awesome party here, people. It’s going to take a ton of work, it’s going to be a ton of fun, and it’s going to be incredibly successful!*

Now, *please don’t get discouraged or overwhelmed*. It seems hard, and it seems like a ton of work, but once you know what to do, and you become systematic at doing it, you can do amazing social media marketing in just a few hours each week. Like preparing to run a marathon, you’ll need to commit to regular activities. But, like running a marathon, thousands of people do it, and do it well. It takes discipline, but YOU CAN DO IT!

*Imagine me in Richard Simmons-looking hot pants, jumping up and down and leading you and your marketing team (plus the boss) in a chant: WE CAN DO THIS WE CAN DO THIS.*

*Now, stop imaging me as Richard Simmons. It's getting weird.*

And here's a screenshot of Richard Simmon's Facebook Page (<http://jmlinks.com/37k>):



You'll noticed that I've "liked" his Page. You should, too. (Or find other Pages that amaze you with their marketing prowess). Richard Simmons has more than 350,000 fans on Facebook! And, he's promised to come back from self-imposed exile, so stay tuned.

### **Be Positive: It's Not the 1970s or 1980s**

There is nothing as powerful as the power of positive thinking. As marketers, we are so fortunate to live in an amazing time with incredible new opportunities to reach our target customers. Can you imagine being a marketer in the sad decades of the 1970s or 1980s, when all they had was the Yellow Pages, trade shows, cold calling, and direct mail pieces?

I mean, “Let your fingers do the walking,” how pathetic was that? Feel sorry for those people in the past, as you and I are lucky to live during an **amazing marketing revolution**. We live in amazing times – Twitter, Facebook, Snapchat, Instagram, and even Google are just a few years or a few decades old (if that). It’s like 1776 in the USA, 1917 in Russia, or 1789 in Paris, just no bloodshed!

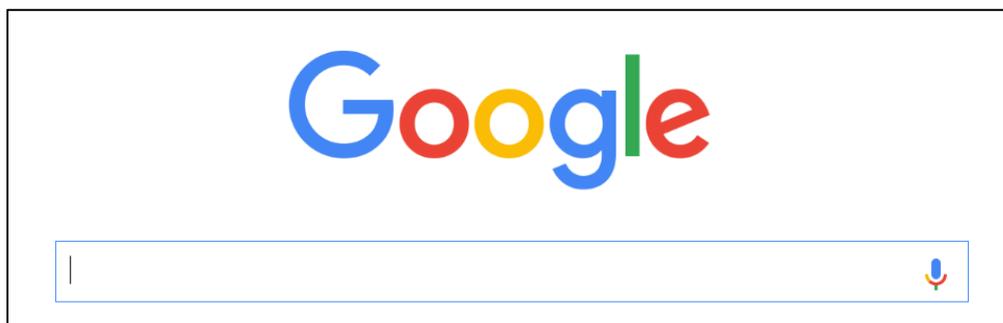
Be **positive** about the present and the future. You are not only lucky enough to live during the *social media marketing revolution*. You are taking positive steps to become an expert at it!

### **Know the Question and Find the Answer**

Once you start to view social media marketing as a systematic process, a great thing will happen: you’ll formulate concrete, *specific* questions. You’ll formulate concrete *specific* tasks, such as “how do I create an infographic?” or “what are the dimensions of a Facebook cover photo?” and “how do I automate my posting to Twitter?”

I am going to share with you one of my best-kept secret websites. It’s an amazing, powerful website that can literally answer almost any question. It’s called, **Google**, and you can find it at <https://www.google.com/>. Bookmark this site. It’s very useful.

Here’s a screenshot:



Once you formulate a specific question, such as “What is the character limit of a tweet?,” you can Google it, to find the answer.

# IF YOU KNOW THE QUESTION, YOU CAN GOOGLE THE ANSWER

Similarly, once you realize, for example, that Facebook allows cover photos, and that smart Facebook marketers swap theirs out from time to time, you can create the “questions” of “How do you create a cover photo for Facebook?” “What are the dimensions of a Facebook cover photo,?” etc. You can then type them into Google to find the answers; Google will point you to the official Facebook help files as well as other helpful blog posts or answer sites on the Web. Indeed, people often make amazing “how to” videos on YouTube, and once you know a question, you’ll almost always find someone who has made a YouTube of the answer. (YouTube is my second favorite top secret site to find answers; check it out at <https://www.youtube.com/>).

*Yes, I know I’m being tongue in cheek, but you’d be amazed at how few people actually realize that they can Google their marketing questions about social media!*

## » IDENTIFY RELEVANT DISCOVERY PATHS

Before we plunge into Facebook, LinkedIn, Twitter, and social media networks on a step-by-step basis, it’s worthwhile to sit back and ponder the big questions of marketing.

*What do you sell?*

*Who wants it and why?*

*And, very directly: how do customers find you?*

This last one might seem like a simple question, but a great social marketer has a very specific understanding of the paths by which customers find her product, service, or company. This understanding then guides -

*How much should you focus on SEO (Search Engine Optimization)? How much should you focus on AdWords? How much on Facebook? Or Twitter? Should you*

*buy ads on Television, or (gasp!) send out unsolicited email (spam)? Is Pinterest worth the effort?*

It makes sense if you think like a fisherman, and you think of your customers like fish. If your “fish” tend to be on Facebook, then you need to prioritize Facebook in your marketing strategy; if your “fish” tend to be using LinkedIn, then you need to prioritize LinkedIn; if your “fish” tend to read reviews on Yelp, you need to prioritize Yelp. And if your fish are 13 years old and endlessly share their day-to-day hopes, dreams and fantasies on Snapchat, well you better get snappin’.

In marketing speak, these are called “**discovery paths**,” and there are five – and only five – discovery paths that really matter in terms of social media marketing.

## **The Five Discovery Paths**

How do customers find you? Let us count the ways.

**SEARCH.** The search path occurs when the customer is “searching” for a company, product, or service. For example, a customer is hungry. He types into Google or Yelp, “pizza.” He browses available restaurants, chooses one, and shows up to get pizza. *He searched for pizza. He found pizza. He made a decision.* The search path is the province of SEO (Search Engine Optimization), largely on Google but also on sites such as Yelp or Amazon that work via “keywords” to help customers find stuff that they want. AdWords advertising is also helpful in this path.

**REVIEW / RECOMMEND / TRUST.** The review / recommend /trust path is based on “trust indicators.” In it, the customer already has created a list of vendors he or she might use, but he is researching “whom to trust.” In this path, he might use the “reviews” and/or “stars” on Yelp or Google as “trust indicators” to predict which pizza restaurant is good (or bad). Reviews and stars are the most common trust indicators in social media marketing, but having a robust Facebook page, with many followers and interesting posts can also be a “trust indicator.” Having an expert-looking profile on LinkedIn can be a “trust indicator” for a CPA or an architect. A recommendation from a friend or colleague also plays into reviews and trust.

**EWOM / SHARE / VIRAL.** *Wow! That pizza was great! Let me take a selfie of me chowing down on the pizza, and post it to Instagram. Or, wow, here is a cat video of cats at the pizza restaurant puzzled by the self-serve soda fountain. It’s “gone*

*viral” on YouTube and has sixteen million views!* The **share path** occurs when a customer loves the product, service, or experience enough to “share” it on social media – be that via electronic word of mouth, a share on his or her Facebook page, a “selfie” on Instagram, or a viral video on YouTube. Others find out via shares from their friends, and suddenly yours is the most popular pizza joint in town.

**INTERRUPT.** The interrupt path is the bad boy of online marketing. Interrupt marketing occurs when you want to watch a YouTube video but before you can watch it, you have to view an annoying ad. Or, when you get a cold call from a recruiter who’s viewed your Profile on LinkedIn, or when you get a spam email on “amazing Viagra.” *Interrupt* is largely used in advertising, and largely used to “push” products that people aren’t proactively looking for. Email marketing can often have a strong interrupt element to it.

**BROWSE.** The browse path is all about getting your message *adjacent* to what a person is reading or viewing on the Internet. In it, you’re looking for something, reading something, or watching something, and alongside comes something else. For example, you go to YouTube to look up “how to tie a tie,” and in the suggested videos at the end is a video for Dollar Shave Club. Or you see Dollar Shave Club videos suggested at the right of the screen. You’re not proactively looking for Dollar Shave Club, but you see their information as you “browse” for related content on sites like YouTube, Facebook, or blogs.

All of these paths can come into play in an effective social media marketing strategy. Your job is to identify your customers, figure out where they hang out on social media, and position your message in front of their “eyeballs,” to use the industry slang for getting *what you sell* in front of *how they see*.

### **Outline Your Marketing “Big Picture”**

For your third **TODO**, download the **Big Picture Marketing worksheet**. For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code ‘**2018social**’ to register if you have not already done so), and click on the link to the “Big Picture Marketing.”

In this worksheet, you’ll write a “business value proposition” explaining what you sell, and who are the target customers. You’ll also identify the most relevant “discovery paths” by which potential customers find your products. You will begin to realize that there is a “method” to the “madness,” as you identify where your customers are and how best to reach them.

## » ESTABLISH GOALS AND KPIs (KEY PERFORMANCE INDICATORS)

Marketing is about measurement. Are we helping our brand image? Are we getting sales or sales leads? How do we know where we are succeeding, and where there is more work to be done? Why are we spending all this blood, sweat, and tears on social media marketing anyway? Is it paying off?

In today's overhyped social media environment, many marketers feel like they "must" be on Twitter, they had better get on Snapchat, or they "must" have a presence on Pinterest, etc. All of the social media companies – Facebook, Twitter, Pinterest, Snapchat, Yelp – have a vested interest in overhyping the importance of their platform, and using fear to compel marketers to "not miss out" by massively jumping on the latest and greatest social platform. **Social media guilt**, however, is to be avoided: if you define a clear business value proposition, know where your customers are, and establish clear goals and KPIs (Key Performance Indicators), you'll be able to focus on those social platforms that really help you and ignore the ones that are just hype.

# AVOID SOCIAL MEDIA GUILT: YOU CAN'T (AND SHOULDN'T) USE EVERY NETWORK

Let's identify some common **goals** for effective social media marketing. The boss might have an ultimate "hard" goal of getting sales leads or selling stuff online. Those are definitely important, but as marketers, we might look to intermediate or "soft goals" such as nurturing a positive brand image online or growing our online reviews.

Generally speaking, social media excels at the "soft goals" of growing brand awareness, nurturing customer conversations, encouraging reviews and the like and is not so good at immediate, direct goals like lead captures or sales. (Not surprisingly, this is why 90% of REI's social media posts are warm and fuzzy items about loving the outdoors, and less than 10% are shameless plugs to buy more stuff).

In any case, having high-level yet soft goals is essential to being able to create a systematic, social media marketing strategy as well as a "drilldown" strategy for an individual social medium, whether that be Twitter or LinkedIn, Instagram or YouTube.

Here are common goals for social media marketing:

**eWOM (electronic Word of Mouth).** Every brand wants people to talk about it in a positive way, and today a lot of that conversation occurs on social media. If you are a local pizza restaurant, you want people “talking” about you and your pizza on Yelp, on Facebook, on Twitter as a great place to get pizza, eat Italian food, cater a wedding, or host a birthday party for little Jimmy. As marketers, a common goal for social media is to grow and nurture positive eWOM, which might be positive conversations on Facebook, positive reviews on Yelp or Google My Business, relationships between us and customers and among customers, and the sharing of our brand across media.

**Customer Continuum.** *A prospect becomes a customer, a customer becomes a fan, and a fan becomes an evangelist.* For example, I’m hungry. I search for “great pizza” in Palo Alto, California, and I find your pizza restaurant. I try your pizza, thereby becoming a customer. It’s good, and I’m a fan: if someone asks me, I’ll recommend *Jason’s Palo Alto Pizza*. And finally, I love your pizza so much, I wrote a positive review on Yelp, I created a YouTube video of me eating your pizza, I took a selfie for Instagram, and I have a new blog on Tumblr about your pizza. As marketers, we want to encourage customers to move to the right on the customer continuum: *from prospect to customer, customer to fan, and fan to evangelist.*

**Customer from Hell.** You also need to be aware of (and seek to mitigate) the “customer from hell” who can hate a brand so much that she writes a negative review on Yelp, posts negative comments on Facebook, or creates a viral YouTube video about your terrible pizza. (**Reputation management** is the industry term for being aware of both positive and negative social media discussions about your brand). Social media marketing is also about reputation management, and especially mitigating “customers from Hell.”

**Trust Indicators.** Customers want pizza. Customers read reviews. Customers use reviews to decide which pizza restaurant is probably good. Similarly, when customers want to go to a theme park, they might check out the Facebook page. They like theme parks that have lively Facebook pages over those that having boring Facebook pages. **Trust indicators** are all about mental “short cuts” that customers make to identify possible vendors, services, or products. A common goal of social media marketing, therefore, is to nurture positive trust indicators about our brand online: reviews, especially but not only.

Here’s a screenshot of “Sushi” from Yelp. Ask yourself, which restaurant is probably better – the one with 169 reviews, or the one with 88?

	<p>5. Kazan</p> <p>★★★★☆ 169 reviews</p> <p>\$\$ · Japanese, Sushi Bars</p>	<p>Mission</p> <p>2809 24th St San Francisco, CA 94110 (415) 282-2001</p>
	<p>6. Takoba</p> <p>★★★★☆ 88 reviews</p> <p>\$\$ · Japanese, Sushi Bars</p>	<p>Financial District, SoMa</p> <p>138 Minna St San Francisco, CA 94105 (415) 361-0448</p>

**Stay Top of Mind.** You visit the pizza restaurant, one time. That encounter is an incredible marketing opportunity! As a marketer, I want to convert that “one touch” to “many,” that single encounter to staying “top of mind” so I can remind you about my business, products, and/or services and entice you to come back. I want you to follow us on Twitter, so I can Tweet special deals, promotions, what’s cooking, and stay “top of mind,” so that when you’re hungry again, you think, *Jason’s Palo Alto Pizza*. I want you addicted to my fun Instagram feed, my clever SnapChat, and even to connect with us on LinkedIn for your business catering needs. Using social media to convert *one touch to many* and *stay top of mind* is an excellent goal.

**Promotion, promotion, promotion.** Social sharing – getting customers to market your brand to their friends, family, and colleagues – is probably the most common social media goal. You want your customers to Instagram their happy kids having a great pizza party at your pizza restaurant! You want your customers to share tweets about their amazing corporate catering event with their Facebook friends. And you want your customers to share your informative industry blog post on cybersecurity with their contacts on LinkedIn. *Encouraging social promotion is a huge, huge goal for SMM.*

Your **TODO** here begins by simply taking out a piece of paper, or opening up a Word document, and jotting down “soft” and “hard” goals for your social media marketing efforts. For extra credit, start to hypothesize which goals might be best accomplished on which social media network.

**Question.** What are the marketing goals of your efforts at social media? (Write them down.)

## The Virtuous Circle

When you sum all of the goals listed above, and probably some you may have identified that I've missed, you get to the **virtuous circle** of social media marketing. When your social media marketing efforts are really working well, you can create a positive feedback loop.

*The more positive reviews you have on Yelp, the more customers you get, the more customers you get, the more positive reviews. The more followers on Twitter you get, the more chances you have to get them to share your discounts, the more discounts they share, the more followers you get. The more people who like / share / comment on your Facebook page, the better your Edgerank (a measurement of how engaging one's content is), the better your Edgerank, the more people see your content, the more people see your content, the more shares you get on Facebook, the better your Edgerank....*

# NURTURE A VIRTUOUS CIRCLE

**Nurturing a virtuous circle** is a major, major goal of an effective social media marketing system. And finally, don't forget, that in most cases you want all of these "soft goals" to turn into "hard goals": a positive brand image to lead to more sales, and a stronger bottom line. All of this can be measured.

For your next **TODO**, download the **Marketing Goals Worksheet**. For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code '**2018social**' to register if you have not already done so), and click on the link to the "Marketing Goals Marketing."

In this worksheet, you'll identify your "hard" goals, whether you have something "free" to offer, and your "soft" goals on social media. Ultimately, these big picture goals will be translated into much more specific goals, germane to a social medium such as YouTube, Twitter, or Facebook. Don't forget to conceptualize what a *virtuous marketing circle*

would look like for your company. Visualize social media marketing success; you'll get there step-by-step.

## » REMEMBER THE BIG PICTURE

At this point, you've begun your social media marketing journey. You've understood that social media marketing is about "throwing" the party more than "attending the party." You've realized you need to start "paying attention" with regard to what other marketers are doing on social media, with an eye to "reverse engineering" their marketing strategy so that you have ideas of what you like, and do not like, in terms of social media. You've started to brainstorm "discovery paths" and "goals" for your SMM efforts.

And you've realized that once you've identified your goals, identified relevant social media, set up your social accounts, the really hard work will be a) promoting your social media channels, and b) creating the kind of content that makes them want to "like you," keep coming back for more, and share your message with their friends, family, and/or business colleagues.

You've understood that **promotion** and **content creation** are the big on-going tasks of successful social media marketing.

## »» CHECKLIST: SOCIAL MEDIA MARKETING ACTION ITEMS

Test your knowledge of the "Big Picture" of Social Media Marketing! Take the *Social media marketing quiz* at <http://jmlinks.com/qzsm>. Next, here are your "Big Picture" **Action Items**:

- Research** whether your customers (and competitors) are on social media. If so, which networks? What are they doing? What interests them, and why?
  - Use **keyword tools** to brainstorm **keyword "themes"** that interest your target customers. Research these keywords on Twitter, Instagram, LinkedIn, etc., to identify companies and customers to "watch."
  - Identify a few **competitors** to reverse engineer, or **companies to emulate**. "Like" their Facebook pages, "follow" them on Instagram, etc.

❑ Begin to “reverse engineer” what they are doing on social media. What type of content are they posting – their own, other people’s content, or UGC (User Generated Content)? What seems to be getting the most interaction, and why?

❑ **Identify** your **search discovery** paths. Which paths (*search, review (recommend, trust), eWom (share, viral), interrupt, browse*) are the most relevant to your business and customers?

❑ **Formulate** (and write down) your **KPIs** (*key performance indicators*) or social media marketing *goals* such as eWOM, movement along the customer continuum, prevent “customers from hell,” grow trust indicators, stay top of mind, or leverage social media promotion not to mention “hard goals” such as eCommerce sales or sales inquiries.

## »»» **DELIVERABLE: OUTLINE A SOCIAL MEDIA MARKETING PLAN**

Now that we’ve come to the end of Chapter 1, your first **DELIVERABLE** has arrived. For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code ‘**2018social**’ to register if you have not already done so), and click on the link to the “Social Media Marketing Plan Big Picture Worksheet.” By filling out this plan, you and your team will establish a vision of what you want to achieve via social media marketing.



# 2

# CONTENT MARKETING

If social media *marketing* is throwing amazing Facebook fiestas, incredible Pinterest parties, and unbelievable YouTube soirees that not only attract and engage your potential customers but also lead them towards a better perception of your brand, and even result in real sales or sales leads ... well, you're going to need incredible *food* and *entertainment*! "Content," in short, is the "food and entertainment" of social media marketing. Whether it's Instagram or Pinterest, Facebook or LinkedIn, YouTube, Instagram, or Twitter, you need a **content marketing machine** – a nearly endless series of blog posts, infographics, memes, photos, tweets, and/or videos that will populate everything from Facebook to LinkedIn to Pinterest to Twitter.

If it sounds like a lot of work, well, it is. I didn't say it was magic or easy. But, let's imagine you're throwing a party for one hundred people, you'd expect to have to pre-plan your food and entertainment. You'd expect to pre-plan the "theme" of your party, whether it's a Mexican fiesta, a Jewish Bar Mitzvah, or a politically correct holiday party, and you'd expect to match that "theme" to the food and entertainment you'd procure or produce. Furthermore, you'd realize that you – as the party planner – may need to enlist the help of other employees at your company to keep the food and entertainment on schedule, or else the party will suffer. Can you put on a successful party? Of course you can! Don't get overwhelmed; just break the process down into manageable parts.

In this Chapter, I'll overview the elements of your **content marketing machine**, and give you tips and tools to enable high speed and efficient production of content for social media.

**Let's get started!**

## **TODO LIST:**

- » Identify Content You Can Easily Produce
- » Think Systematically About Content

- » Identify Buyer Personas and Keyword Themes
- » Produce Your Own Content on Schedule
- » Blog, Blog, Blog: You Gotta Blog
- » Curate Other People's Content
- » Encourage User Generated Content
- » Remember the Big Picture
- »» Checklist: Content Marketing Action Items
- »» Deliverable: A Content Marketing Plan

## » IDENTIFY CONTENT YOU CAN EASILY PRODUCE

We're all good at something. Some of us can cook, some of us can't. Some of us can take photos, some of us can't. Some of us can write, and some of us can't. This is true for individuals, and it's true for companies as well. This is also true for companies as they work on their social media marketing.

Let's return to REI (<https://www.rei.com/>), for example. As a company that lives in the outdoor industry, REI is a company that is "good" at –

- **Taking photos and videos.** REI staffers take brilliant photos of the outdoors, photos that feature its products. Check out REI's Instagram at <https://www.instagram.com/rei/> to see for yourself.
- **Writing.** REI staffers write with passion about the environment, and about how much fun it is to "get outdoors." Check out REI's blog at <http://blog.rei.com/>.
- **Motivating customers** to participate. REI constantly encourages UGC or *user generated content*, as its customers upload videos and stories about the outdoors, and interact on the company's social media channels.

To see this in action, simply browse the company's Facebook Page at <https://www.facebook.com/REI/> to see how they weave photos (images), videos, and written content (blog posts) both by REI staff and by customers. REI produces a lot of great content!

## So Can You

Guess what? So can you. Before you feel daunted and give up, remember you probably aren't competing against the likes of REI, Disney, or Airbnb. You're competing against other companies in your own sad, pathetic industry, and they aren't any smarter or better than you. (*Ok your industry isn't sad and pathetic, but you know what I mean. It's not inhabited by titans of industry or geniuses like Einstein.*). **You don't have to run faster than the bear; just faster than your buddy.** So, with a little luck, some strategy, and some hard work, you can (and must) create a content marketing system to produce content to feed your social media needs.

**Remember:** you (and your company) must be experts in something (hopefully, your products or services). You (and your company) must be passionate about something (hopefully how your products or services are used). All you really have to do is use your iPhone to take pictures of this, your laptop to write about it, and some nifty online tools to create cheesy quotes about it, tweet about it, create infographics, about it, etc., etc.

**Share your knowledge and your passion. Become a “helpful expert” to your customers.**

That's what content marketing is really all about.

Your first **TODO** is to inventory your own and your company's skill set. What type of content is going to be relatively easy for you, your company, and even your own customers to produce? If you're a pizza restaurant, for example, it's going to be pretty easy to whip out the iPhone and snap a photo of happy customers enjoying a birthday celebration, if you're a wedding planner, it's going to be pretty easy to take a quick video with the bride and groom on their special day, and if you're a CPA, it's going to be relatively easy to write a short blog post about upcoming changes to the federal tax code and how they impact married couples. Can you take photos? Can you shoot video? Can you write?

Or perhaps you love quotes. It's not going to be hard to go to a website such as Pablo (<http://jmlinks.com/29b>) and input a few motivational quotes that relate to your industry, pick an image, and generate a “quotable photo” for Facebook or Instagram. Perhaps you love data, and you can generate infographics using free tools such as Easely (<http://jmlinks.com/29c>), where you can input data and images and create eye-appealing infographics. And, finally, perhaps you're up for a more beefy type of writing and you can conceptualize and implement a free eBook. You can download templates

from Hubspot (<http://jmlinks.com/29d>), or even go whole hog and write an eBook for Amazon using their free KDP services (<http://jmlinks.com/29e>).

The point of this exercise is to get you thinking about what type of written or visual content can you / your company produce easily and systematically to feed your social media channels? What are you good at, and what will come easily? Where are there easy opportunities to generate content, whether that be a photograph or a blog post?

## » THINK SYSTEMATICALLY ABOUT CONTENT

What kind of content do people generally want? What kind of content gets shared? Among the most popular and commonly shared items on social media are the following:

**Photos.** Photographs and images are the bread-and-butter of Facebook, Instagram, and even Twitter.

**Memes.** From *grumpy cat* to *success kid*, memes make the funny and memorable, sticky and shareable on social media. I love memes; here's a screenshot of one on "Social Media Marketing:"



**Infographics and Instructographics.** From how to tie a tie to sixteen ways you can help stop global warming, people love to read and share pictures that tell a story, hopefully with facts.

**Blog Posts.** An oldie but goodie: an informative, witty, funny, informational, or fact-filled post about a topic that matters to your customers.

**Short Text Posts or Tweets.** Funny, important, moving, informative quotations. Cute and clever quips on industry events. Even within the 140 character limit of Twitter, you can share ideas that are short, sweet, and powerful. Here's a funny meme on that topic:



**Slide Shows.** From Slideshare to just posting your PowerPoints online, slide shows are a hybrid visual and textual cornucopia of social sharing fun.

**Videos.** If a picture tells a thousand words, a video can tell ten thousand. YouTube is a social medium in its own right, but the videos themselves are content that can be enjoyed and shared on networks like Instagram and Facebook.

These are just the *archetypes* of content, the *genres* of information as it were. They're just empty shells. Your job is to identify which types will be the easiest for you and your company to produce, and to then, start your content production machine.

## » IDENTIFY BUYER PERSONAS AND KEYWORD THEMES

Social media marketing is a party, not a prison. If you don't produce content that your customers want to read or engage with, they'll leave. So, first up, educate your boss or CEO that the customers probably do not want to watch him or her reading the company's annual report. What may be interesting to your boss may not be what's interesting to the customers.

Your second **TODO** is to brainstorm the **buyer personas** and **keyword themes** that customers care about, and the type of content that they'll be interested in and will find engaging.

### Build a Keyword Worksheet

While **keywords** do not play as tight a role in social media marketing, as they do in search engine optimization (SEO) or AdWords, you still want to identify customer keyword themes, whether these be "pain points" or "points of interest." What are people talking about on social media, what are they searching for on Google, and where does a topic that interests customers intersect with what you have to offer? You must get inside your customers' heads and brainstorm not only the types of content (images, blog posts, infographics) that interest them but also the content itself (i.e. What does it explain? What does it describe with passion? What does it convey as a photo?)

A good way to conceptualize this is to have a meeting with your marketing team, and conceptualize **buyer personas** – stereotypical mockups of typical customers.

A Palo Alto pizza restaurant, for example, might brainstorm **buyer personas** like:

**The Hungry Worker Bee.** This is a man, aged 27-35, who works in downtown Palo Alto, and is looking for a quick bite-to-eat. He likes pizza, and is value conscious plus time-sensitive.

**The Office Manager.** She works in a nearby office, and is charged with ordering the catering for office meetings. She's interested in fun, lively food that's easy to get and fits within her catering budget.

**The Busy Mom or Dad.** This person has a few young kids and lives close to Palo Alto. They're looking for either quick pizza delivery for a Thursday night, or perhaps a venue for their kid's birthday party.

Next, take each persona and brainstorm the types of content / themes that they'd be interested in. The Worker Bee, for example, would be interested in learning about coupons, discounts, and special offers of the "pizza of the day," for example. So you'd need to generate either coupon codes or perhaps short tweets about a "pizza of the day" that features *kale* and *pesto* and is on sale with a secret coupon code known only to your followers on Twitter.

The Office Manager, in contrast, might be interested in blog posts about how to throw better office parties, or catering ideas that are fun for yet another weekly sales meeting. And the Busy Mom or Dad might want to view (and share) photos of their kids (or the kids of their friends) having a blast on Birthday Night at the local pizza restaurant. Each buyer persona, in short, has certain thematic interests and needs.

**Tool.** Hubspot produces a nifty buyer persona tool at <http://jmlinks.com/29s>. Answer a few questions and the tool will literally create a buyer persona profile complete with photo.

## Tools to Research Keyword Themes

Once you've brainstormed a few buyer personas, role play "as if" you were that buyer persona and write down the keyword themes that might interest that person. To use a different example, let's say you're a wedding planner, you'd realize that the *bride-to-be* is an obvious buyer persona and she'd be interested in topics such as "how to plan a wedding on a budget," or "tips on selecting the best wedding venue," or "how to deal with divorced parents and their new spouses at a wedding reception," etc. Or imagine your company sells insurance, you'd identify a buyer persona of the *busy thirty year old dad* with two kids, who wonders "what's the best way to set up a living trust," or "what's the difference between term life insurance and whole life insurance," and you'd write a nifty blog post or perhaps create an eBook. By role-playing, you get "inside the head" of each buyer persona and identify the topics that would interest them as a photo, as a blog post, as a tweet, as a video, etc.

Here are some fun tools that can help you brainstorm keyword themes for your social media content:

**SeedKeywords** (<http://jmlinks.com/29f>). Simply type in a scenario, and this tool generates a URL you can email out to your team members. Then, each can

input the keyword themes that they think that “buyer persona” might be interested in.

**SERPS Keyword Tool (<http://jmlinks.com/29g>).** Type in one keyword (e.g., wedding, or pizza) and see search volume on Google. As you use it, also look for related or helper keywords.

**SEO Chat Keyword Tool (<http://jmlinks.com/25y>).** Input a “starter” keyword like “wedding planning” and this tool will poll Google, Bing, Amazon, and YouTube for related keywords. It’s a great way to brainstorm blog post headlines and ideas, in particular.

If you have a budget, I also highly recommend that you use Buzzsumo (<http://jmlinks.com/29j>). For \$99 a month, this tool allows you to input a keyword and see the most shared content on Facebook, LinkedIn, Twitter, Pinterest, and Google+. Here’s a screenshot for the most shared content for the keyword *wedding*:

**Buzzsumo Pro** Content Research Influencers Monitoring

Saved Content Most Shared Trending Now Backlinks Content Analysis Facebook Analyzer

Filter by Date

- 24 Hours
- Past Week
- Past Month
- Past 6 Months
- Past Year
- Specific Range

In-Depth Articles Only

Language show

Country (TLD) show

Filter Domains show

Content Type:

- Article
- Infographics
- Guest Posts
- Giveaways
- Interviews
- Videos

wedding Search! Export Create Alert

Enter a topic or domain: big data, cnn.com. Advanced Search Options Save Search

Tip: You can ignore video results by unchecking "Videos" in the filters to the left

Sort by: Total Sh

	FACEBOOK ENGAGEMENTS	LINKEDIN SHARES	TWITTER SHARES	PINTEREST SHARES	GOOGLE+ SHARES
<b>Wedding Photography</b> Washington DC Save youtube.com - More from this domain Feb 3, 2017 Video	1K	2	36	0	1.5M
<b>30 Utterly Gorgeous Engagement Ring Ideas   Wedding Forward</b> Save weddingforward.com - More from this domain Jun 11, 2016	316	2	6	651.3K	5

The tool also allows you to enter the domain of a competitor or popular blog in your industry and see the most shared content as well. For example, enter *nytimes.com* to see the most popular content shared on the New York Times across social networks. You can also sort by network to see the most shared content on Facebook, LinkedIn, Twitter, Pinterest, and blog links. So your steps are:

1. Login to Buzzsumo.com.
2. Enter a keyword such as “organic food” or “tax refund” and select a time horizon such as “past month” or “past year.”
3. Sort by network such as Facebook or LinkedIn.
4. Click to view the most shared content.
  - a. Reverse engineer what it’s about.
  - b. Hypothesize why it received so many shares.
5. Click back and click on “View sharers” to see which influencers on Twitter shared the content.

As you research keywords, look for themes that connect “what your customers want” with “what you offer.” Don’t miss **adjacent keyword themes**. The Palo Alto Pizza Restaurant, for example, should realize that its customers will also be talking about, and interested in, keyword themes such as “places to eat in Palo Alto,” “where to take a client to lunch,” “things to do in Palo Alto, etc.” You always want to “fish where the fish are,” so look not only for keyword themes that are spot on to what your company offers but also for adjacent keyword themes. Aeromexico, for example, is an airline that flies to Mexico, but it’s social media keywords aren’t just “airlines” or “cheap air tickets” but also keywords such *travel, best tourist destinations in Mexico, Latin America, things to do in Mexico City, etc.*

For your third **TODO**, download the **Keyword Worksheet** and the **Content Marketing worksheet**. For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code ‘**2018social**’ to register if you have not already done so), and click on the link to the “Content Marketing.” On the **keyword worksheet**, fill out the tab marked “Social Media Themes.” On the **Content Marketing Worksheet**, fill out the sections on buyer personas and keyword themes.

## » PRODUCE YOUR OWN CONTENT ON SCHEDULE

Now that you have your buyer personas and keyword themes in hand, you can return to your list of content that’s easy for you to produce, and look for opportunities. You’re

looking to marry “content that’s easy to produce” with “content that your customers want.” For example, our Palo Alto Pizza Restaurant would realize that customers like to see and share photos of themselves and their friends having a good time at the restaurant, especially pictures of family events such as birthdays. So your content production tasks become:

- **Birthday Customers.** Identify customers who are coming to the restaurant to celebrate a birthday. For example, have each waiter or waitress ask customers, “Is anyone celebrating a birthday today?” If so, ask if you can take a picture of their birthday party and share it to the company Facebook page. Get their emails and email them an alert that their party has been “shared” (*because they will likely then reshare it with their friends and photos*).
- **Incentivize.** Many restaurants already give the birthday customer a free dessert such as an ice cream sundae or brownie. Make sure that your restaurant has some incentive for customers who are celebrating a birthday to identify themselves. For example, “Check in on Facebook” and be entered to win a free pizza on your birthday!
- **Photo.** Take the photo. When the waiter or waitress brings out the birthday dessert, make sure that they have a mobile phone handy and ask the customers for consent to take a celebratory photo. Be on the look out for other customer photo opportunities such as birthdays, gatherings of friends, or even that group of business customers on a quick lunch.
- **Remind.** Get the email address, if possible, of one or all of the customers, or leave a card with the check that says “Check our Facebook Page and Instagram Page” for our birthday photos and birthday photo contest.
- **Promote.** Make sure that you have something like a “birthday photo contest” on Facebook or Instagram, whereby you upload the “birthday photos of the week” and then customers can vote by clicking the “like” button. The photo with the most “likes,” wins, and its recipients can get a free pizza!

In this way, you have an easy-to-understand, content production system for your wait staff. Every time there’s a birthday, they’re going to ask for permission to take a photo and enter that photo in your Instagram / Facebook photo contest.

Next, let’s look at **blog content**. You’ll realize that one of your buyer personas is the busy office manager in Palo Alto who’s looking for ideas for inexpensive, fun catering for the weekly sales meeting. You want your pizza restaurant to be discovered by her, and get in the rotation for caterers. She’s probably looking for blog articles on human resources,

catering, and employee morale as well as caterers in Palo Alto. So, in this case, you'd identify fun article topics for your blog on "how to boost employee morale with better office parties," or "tips on catering for employees who have diverse dietary needs," etc. In this case, you'd identify someone at the pizza restaurant who is a decent writer and assign that writing task of writing at least one blog post per month on the topic of "Palo Alto Catering" and related keywords.

Or, take your buyer persona of the Hungry Worker Bee. These people often go to Twitter or Instagram, searching for daily lunch specials, special deals, and information on "what's cooking." In this case, your content would be as simple as a daily tweet / photo with a discount code or hashtag such as *#PaloAltoPizza25* that they simply need to say upon ordering to get the discount. Or, perhaps you realize that *#tacotuesday* is a trending hashtag on Twitter every Tuesday, so your content production task it to piggyback on the buzz about *#tacotuesday* by having a taco-style pizza ready every Tuesday. You then tweet out a short tweet with picture onto Twitter and Instagram, and use the relevant hashtags.

In each case, you're identifying a type of content (*photo, blog post, or tweet*) that fits into the keyword themes that your target customers care about. You then figure out what content needs to be produced, who needs to produce it, and when it needs to be produced. Your **TODO**, here is to return to the **Content Marketing Worksheet** and populate the section on a Content Schedule. It should answer the following questions:

- What **type of content** needs to be produced, such as photos, videos, blog posts, tweets, etc.?
- What **keyword themes** does this content touch upon that matter to your target customers?
- **Who** is going to produce this content?
- **When** are they going to produce it? (Not just Tuesdays, but at what "event" or "moment," such as "Every time we have a birthday customer, we will offer to take a fun photo," or "Every Mother's Day we will have a customer contest asking customers for their favorite memory of their Moms.")
- **Where** will this content be **posted** on social media? Will it go to Facebook, Instagram, your blog, Twitter, YouTube, etc.?

Successful content marketing is about being very, very **systematic**.

## » **BLOG, BLOG, BLOG, YOU GOTTA BLOG**

Any business that's serious about social media marketing must have a blog if for no other reason than a blog gives you an easy place to put your articles, infographics, photos, and videos that you can then reference on Twitter, Facebook, Pinterest, etc.

### **You gotta blog!**

If you don't have a blog on your website, ask your web designer to set one up immediately, preferably at your domain.com/blog. The easiest platform to use is WordPress. If you can't use WordPress or set one up on your own domain, I recommend Google's Blogger platform at <https://www.blogger.com/>.

**Blogs** are so important for social media content, that I want to spend some time on blogging. I'm assuming you have set up a company blog, so structurally you're ready to write your first post. (If you've already written a few posts, you can also revisit and reoptimize them as indicated below).

Your blog and the blog posts on it can serve any or all of three purposes.

1. as a **trust indicator** to substantiate your company as a "helpful expert)
2. as an **SEO asset**, that is - as a way to get to the top of relevant Google, Yahoo, and Bing searches via basic SEO) (*This is covered in-depth in my [SEO Fitness Workbook](#), so we will not cover it here*).
3. as **content** for posting and **sharing** to your social media networks.

Each of these, conceptually, are different things, but one blog post can be oriented towards one, or all, of them. For example, a blog post on "Seven Tax Tips for Expatriates Living in the USA," can be a *trust indicator* substantiating your CPA firm as experts in international tax issues, it can be an *SEO asset* helping get your company to the top of relevant Google searches, and it can be *content* that you can share on social media networks like LinkedIn to stay top of mind among potential customers and encourage social sharing.

## **Identifying Keyword Themes for Your Blog**

What should you blog about? What type of content should you create? The answer is to identify **keyword themes** that touch on what your target customers want to know about. Clients seeking international tax advice, for example, would be interested in reading blog posts on ways to minimize double taxation, or what types of behavior is most likely to provoke an IRS audit. Persons planning a wedding might be interested in comparing the merits of a “destination wedding” in Mexico, with an “at home” wedding in Los Angeles. And persons interested in cybersecurity for their corporations might be interested in a blog post with infographic on the twelve most common security holes in a typical corporate network.

# A STRONG BLOG TOUCHES ON KEYWORD THEMES THAT PEOPLE CARE ABOUT

## **Emotion, Emotion, Emotion (and Some Utility)**

In general, successful blog topics for social media will hit emotional themes such as usefulness, being counterintuitive or counterfactual, being shocking, provoking fear or outrage, or being funny. It’s really all about utility or emotion; outside of LinkedIn (which is the most serious network), emotional triggers are by far the most common content.

Accordingly, if there is an “emotional” angle to your blog post, be sure to touch on it, and be sure to include it in your headline.

*Once you have the keyword target, the next step is to write a catchy headline and write a catchy blog post that hits on either emotion or usefulness.*

Let’s take the example of a Los Angeles CPA firm that has expertise in international taxation issues. Our keyword research has identified the FBAR requirements which require reporting of overseas assets as a “hot button” issue among our buyer personas. We might then take the topic of “FBAR compliance,” and spin out blog headlines such as:

*Why FBAR Matters to Your Clients (Even If They Don't Know It Yet) (“utility”).*

*Why What You as a CPA Don't Know About FBAR Is Going to Cost You (“fear”).*

*The FBAR: An Outrageous Intervention of the Government in our Lives (“shocking”)*

*An FBAR Tragedy: A Small Businessperson Forced into Bankruptcy (“Outrage or sentimentality”)*

Fun tools that will help you “spin” blog topics and titles for social media are the Portent Idea Generator (<http://jmlinks.com/17g>) and Hubspot’s topic generator (<http://jmlinks.com/9w>).

### Share Systematically on Schedule with Hootsuite

Finally, now that you have a well-written blog post that touches on trending industry themes of interest to key customer segments, it’s time to share it. Post it to your blog, and then use a URL shortener like <http://bitly.com/> or <http://tinyurl.com/> to shorten your long blog URL. Then paste it into Hootsuite (<http://jmlinks.com/29k>), summarize the topic, and post it strategically to your Twitter, Facebook, LinkedIn, and wherever else appropriate. (Hootsuite has its own built-in link shortener as well, here’s a screenshot:)



To sum up, once you know a keyword theme, the process of creating a blog post is as follows:

1. **Identify the blog concept and relevant keywords.** These define what the blog post is about and which keywords people are likely to search for. Use a tool like Buzzsumo (<http://jmlinks.com/29j>) to see what’s already being shared on social media sites.
2. **Outline the content and write a rough draft.** Just as in all writing, it’s good to write out a rough draft. A good blog post should have about four to five paragraphs of text. “Less is more” when it comes to social media, so make the blog post pithy and informative.
3. **Identify a provocative image.** Whether it’s on Instagram, Facebook, or LinkedIn, people respond to images. Use a free image site such as Foter (<http://foter.com/>) and find an image that conveys the essence of your blog post.
4. **Write a catchy, keyword-heavy headline.** It’s no accident that popular sites like *Buzzfeed* and *Huffington Post* use shocking or provocative headlines! *Dog bites man, Read Donald Trump’s Latest Outrageous Tweet!, etc.* People react to, and share, content that hits an emotional nerve and the headline is the first step towards a strong emotional reaction.
5. **Finalize the content.** Review your content and make sure it is easy-to-read, preferably with lists and bullets.
6. **Share the content.** Identify the appropriate social media platform such as LinkedIn, Twitter, Facebook, Instagram, etc., and share your post. Use a tool like Hootsuite to organize and schedule your shares.

**VIDEO.** Watch a video tutorial on how to write social media-friendly blog posts at <http://jmlinks.com/16p>.

## Your Blogging Objectives

In terms of social media marketing, your blog objectives are a) to stay “top of mind” among customers and their contacts, b) to substantiate your organization’s brand image as a “helpful expert,” and c) to encourage “social sharing” so that friends of friends, and colleagues of colleagues, can become aware of your company and its products or services. A strong blog post can be great as a trust indicator, great for SEO, or attractive for social media sharing, or all three! So, start blogging!

## » CURATE OTHER PEOPLE’S CONTENT

Effective content for social media comes in two main varieties: **your own content** and **other people’s content**. We’ve discussed your own content, such as photos or blog

posts that you will identify and systematically generate. But because you'll need a lot of content to feed your social media channels, you'll probably want to **curate** other people's content. *Curate* is just a fancy word that means identifying useful content in your industry, summarizing it via a short headline or summary paragraph as in a tweet, and sharing this content on your social networks like Twitter, Facebook, Google+, etc. I, for one, do a lot of content curation on Google+. You can check me out on Twitter at <http://jmlinks.com/37m>. Here's a screenshot of my sharing of a link to the Marketoonist:



By diligently paying attention to blogs, publications, and trade shows on SEO, Social Media Marketing, and AdWords (via tools like *Feedly.com*, *Buzzsumo.com*, *Drumup.io*), I systematically identify, read, and “curate” the best content for my followers. I thus have other people's content to share on my own social media channels (Twitter, LinkedIn, Google+, Facebook, etc.) and thereby work to stay top of mind with my target customers and position myself as a “helpful expert.”

## Be a Helpful Expert

This idea of a “helpful expert” is a good way to wrap your head around content curation. You’ll position your company as a “helpful expert” by looking through all the junk and noise in your industry, identifying the best / most useful content from industry blogs, gurus, and publications, and then sharing this content to your own social media channels. If producing your own content is all about being a good *photographer*, *writer*, or *videographer*, content *curation* is all about being a good *editor*.

The steps to content curation are:

1. Identify your **keyword themes** (which you have hopefully already identified above), including broader industry themes that you might not want to produce your own content but you might want to monitor for relevant content.
2. Systematically **research and identify content**. Browse industry blogs, portals, websites, social media feeds, etc.. Separate the wheat from the chaff, meaning throw away the low quality content and identify the truly interesting content that will interest your target customers.
3. **Summarize** this content in short format, ideally less than the 140 characters of Twitter, including a short URL to the full content using a URL shortener like bitly.com or tinyurl.com.
4. **Share** this content to your social media channels on a regular basis, using a scheduling software like Hootsuite (<http://jmlinks.com/29k>) or Buffer (<http://jmlinks.com/29m>).

## Advantages and Disadvantages

You might be tempted to ask why you should curate the content of others vs. using your own content. While it’s certainly true that producing your own content is better (because you can control the message and directly promote your own company or product), few of us have the budget or resources to produce sufficient content on our own to fill our content pipeline. To stay top of mind with customers, you need a lot more content than you’ll be able to produce yourself.

There are thus advantages and disadvantages to your own content vs. other people’s content. The advantage of other people’s content is that it is easy to get, while the advantage of your own content is that because it’s yours, you can customize it to your desired message. The disadvantage of other people’s content is that you do not control the message (and it thereby promotes them to some extent), while the disadvantage of your own content is that it takes time and effort to produce. It’s a lot like the food at our party

analogy. The advantage of other people's tacos is that they take less effort on your own part but (if they're good), they promote the actual producer of those tacos. The advantage of your own tacos is that they taste better (hopefully) and they promote you as the guru of tacos, but the disadvantage is that they are more work.

Going back to review the "types" of content you may want for your social media marketing content machine, you'll see that you have –

Your own blog post vs. the blog post of an industry guru

Your own photograph vs. the photograph of a great photographer

Your own quote vs. a famous quote by somebody else

Your own webinar vs. the webinar being put on by industry luminaries.

Go back and review some companies that are doing social media well (e.g., Whole Foods, REI, HP, Bishop Robert Barron, Seth Godin), and you'll see that many of them mix and match "their own content" and "other people's content" plus sometimes they commentate on the content of others (a "hybrid" model).

Let's drill down into other people's content.

## **Finding Other People's Content to Share on Social Media**

You want to start systematically identifying great content in your industry, and queuing this up to be shared on your social networks. Your goal is to be a "helpful expert," the person who tells others, "Hey! Did you know that so-and-so is having an amazing free webinar on Thursday?," or "Hey! Did you see that our industry journal just published an in-depth study on such-and-such topic?" Other People's Content or OPC is easy to find, easy to share, and helps to position you as the person or company that really has their ear to the industry pulse.

How do you find quality content produced by other people? How do you do this in an easy and systematic way?

Fortunately, there are tools to help you systematically identify and share other people's content. (All are listed in the *Social Media Toolbook, content marketing section* and on the my *Social Media Marketing Dashboard*). Here are some of my favorites:

**Bookmark / Read Industry Blogs.** Identify the top industry blogs in your industry, bookmark them (and/or input them to Feedly), plus follow them on social media as on Facebook, LinkedIn, Twitter. You can share their content to your followers, plus commentate on content that they're producing. To find blogs in the first place, go to Google and type in a keyword relevant to your company's industry and the word blog. For example, visit <http://jmlinks.com/12w> which is a sample search for blogs on *proteomics*

**Google Searches.** Enter your keyword themes into Google. Click on the *Tools Menu > Past Month*. Alternatively, click on the *News* tab. This is a good way to find timely blog post and articles on your keyword themes for sharing. See it in action for "organic food" at <http://jmlinks.com/37n>.

**DrumUp (<https://drumpup.io>).** DrumUp integrates easily with most social media platforms and helps you curate and share content that is useful to your followers.

**Feedly (<http://feedly.com>)** - Feedly is a newsreader integrated with Google+ or Facebook. It's useful for social media because you can follow important blogs or other content and share it with your followers. It can also spur great blog ideas.

**Easely (<http://easel.ly>)** - Use thousands of templates and design objects to easily create infographics for your blog. A competitor is Piktochart (<http://piktochart.com>).

**Meme Generator (<http://memegenerator.net>)** - Memes are shareable photos, usually with text. Memegenerator.net makes it easy to find, and create, memes of your very own to share. You can also search *Google image search* for "meme" plus your "keyword" to find funny memes that are relevant to your community. See it in action at <http://jmlinks.com/37p>.

**Buzzsumo (<http://buzzsumo.com>)** - Buzzsumo is a 'buzz' monitoring tool for social media. Input a keyword, select a date range like "last week," and this tool will show you what is being most shared across Facebook, Twitter, LinkedIn, etc. You can also input a domain such as *nytimes.com* or one of your industry blogs and also see what is being most shared from that domain.

**Google Alerts (<https://www.google.com/alerts>)** - Google alerts allow you to input keywords and then receive daily or weekly alerts of new items that the Google search engine finds on those keywords.

A final nifty tool is Start.me (<https://start.me/>). Sign up for this free service, and you can build a personalized dashboard with links to all your favorite industry blogs, key tools like Feedly or Buzzsumo, canned searches on Google, etc. You can even share these dashboards with your team. Imagine having a Monday afternoon assignment of launching your Start.me personalized dashboard, browsing Feedly and key industry blogs, checking your Google alerts, and then quickly identifying interesting content, summarizing it, and sharing it to your social media networks by scheduling it to Hootsuite. *We're talking the systematic production of content marketing here, factory edition.* By being systematic, you can fill your social media content pipeline in just a couple hours a week.

“I want to be a machine.” ~ the artist, Andy Warhol

And, as part of the social media illusion, you don't have to share the amazing tools above with your customers. They'll just think you are gung-ho awesome. The “illusion” of effective social media marketing will work in your favor: you will be perceived as the industry guru that somehow, never sleeps, and is aware of every important industry trend, “how to” video on YouTube, and key article that's up for debate in the industry blogosphere.

**VIDEO.** Watch a video tutorial on using Buzzsumo, Feedly, and Hootsuite to identify and share “other people's content” for social media marketing at <http://jmlinks.com/16j>.

## **Interact with Others on Social Media**

Finally, as you are working on content curation and “other people's content” don't forget to **interact with others** (either as an individual employee or as a company Page). Follow, like, comment, and share the content of others. Respond to customers who comment on your own Facebook Page or Twitter Account. It's *social* media after all, which means it's a two-way street between you and your customers.

*People not only appreciate but expect that brands will be participatory on social media!*

As you engage with others on a given social media network, look for opportunities. This can be as simple as following, liking, commenting on, and sharing the content of other brands or individuals in your industry. Or it can be as complicated as identifying “influencers” more powerful than you, and systematically drawing them into a conversation or interaction. However you do it, remember not just to “broadcast” your company’s message but to participate in the 24/7 365 conversation that is Twitter, Facebook, Instagram, LinkedIn, etc. On some networks like Instagram, participating is a great way to promote your account, so don’t fall into the trap of thinking that “participation” is 100% separate from “promotion,” as it isn’t.

## » ENCOURAGE USER GENERATED CONTENT (UGC)

Never forget the *social* element of social media. Don’t think of this as a project you’ll do by yourself; you need employees in your company to help, and you need the participation of your customers and fans. You’ll want to enlist the support of other employees in your company, especially the frontline, customer-facing staff, to look for content opportunities. If at all possible, you also want to encourage user generated content or UGC. UGC is both cheap (your users will be doing the heavy lifting) and engaging, as users love to share and see their own content. Here are some ways to encourage UGC:

**Ask for Interaction.** Simply ask for feedback. Don’t just post a photo to Instagram or Facebook. Post a photo with a query. Post a picture of your latest “Taco Pizza” concoction and ask users if they think they’ll like it. Don’t post a photo that says “Happy Mother’s Day” to Facebook, but rather post a photo of a mom and child and ask users to share their favorite memory of their own mom.

**Have Contests.** Within reason, contests are a great way to solicit UGC. Don’t just post a picture of a cute kid at his birthday party eating pizza in your restaurant. Post the photo of the kid, and ask them to enroll in your “cutest kid of the month” contest as measured by Facebook and Instagram likes.

**Conduct Surveys.** User your blog, your Twitter, or Facebook to engage in customer surveys. Facebook, for example, has an easy-to-use App to add surveys to your business Facebook page (<http://jmlinks.com/29n>).

**Use Hashtags.** Especially on Instagram, but also on Twitter, you can set up a special hashtag just for your customers to share posts about your products or services. Airbnb does this on Instagram with [#airbnb](http://jmlinks.com/29p) (<http://jmlinks.com/29p>) as do vendors like REI with [#optoutside](http://jmlinks.com/29q) (<http://jmlinks.com/29q>). If you’re in a fun industry where people like to

“show off,” you may not even have to incentivize people with a contest to get them to generate photos, tweets, or other content that promotes your brand!

You can also commission content, for example, by sending bloggers free product samples and asking them to blog or video blog about your products or services. (If you do so, you’ll need to have them identify per FTC regulations that they were given free stuff). Search YouTube for *unboxing* (<http://jmlinks.com/29r>), for example, and you’ll discover there’s a whole genre of unboxing or haul videos in which people showcase and talk about products. To watch one of the more bizarre ones, check out the YouTube video at <http://jmlinks.com/29u>. Your **TODO** here is to brainstorm which users are most likely to spontaneously create positive content about your company, product, or service. How do you identify them? How do you motivate them? How can you nurture them? Love your superfans! Encourage them!

## » REMEMBER THE BIG PICTURE

At this point, you’ve begun your social media marketing journey. You’ve understood that social media marketing is about “throwing” the party more than “attending the party.” You’ve realized you need to start “paying attention” with regard to what other marketers are doing on social media, with an eye to “reverse engineering” their marketing strategy so that you have ideas of what you like, and do not like, in terms of social media. You’ve started to brainstorm “discovery paths” and “goals” for your SMM efforts.

And you’ve realized that once you’ve identified your goals, identified relevant social media, set up your social accounts, the really hard work will be creating the kind of **content** that makes them want to “like you,” keep coming back for more, and share your message with their friends, family, and/or business colleagues.

You’ve understood that **content creation** and **promotion** are the big on-going tasks of successful social media marketing.

## »» CHECKLIST: CONTENT MARKETING ACTION ITEMS

Test your knowledge of Content Marketing! Take the *Content marketing quiz* at <http://jmlinks.com/qzcm>. Next, here are your Content Marketing **Action Items**:

- ❑ **Brainstorm** the types of content that your company can easily produce such as photos, memes, infographics, blogs, quotes, slide shows, videos, etc.
- ❑ Identify **buyer personas** and **keyword themes**. Create a *Keyword Worksheet* identifying your keywords on a continuum from “adjacent” or “educational” to late-stage or “transactional” keywords.
- ❑ **Research** content by **competitors** using a tool like Buzzsumo to identify the *most shared content* and reverse engineer why. Brainstorm how you, too, can create highly interactive or shareable content.
- ❑ Identify the **three types of content**: your own content, other people's content, and UGC (User Generated Content). What will be your easiest and most effective mix of content?
  - ❑ Create a **content map** for your own content to be produced.
  - ❑ Set up **tools** like Google alerts, Feedly, DrumUp or Buzzsumo to pre-identify the content of others.
  - ❑ Brainstorm **UGC content opportunities** and, if possible, set up the “systems” to begin encouraging UGC.
- ❑ Create a **content calendar** identifying the type of content you will produce, when it will be produced, and who will produce it. *Set up a **blog** and begin blogging, for example. Set up a calendar of who will check Feedly and share content (and when), for example.*
- ❑ **Share your content** in a systematic way using a scheduling tool such as Hootsuite or Buffer.
- ❑ **Be interactive**. Participate with your customers by engaging them; look for other engagement opportunities.

Check out the **free tools**! Go to my *Social Media Marketing Dashboard > Content Marketing* for my favorite free tools on content marketing. Just visit <http://jmlinks.com/smmdash>.

## »»» DELIVERABLE: A CONTENT MARKETING PLAN

Now that we’ve come to the end of Chapter 2, your **DELIVERABLE** has arrived. For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook*

2018, enter the code '**2018social**' to register if you have not already done so), and click on the link to the "Content Marketing Worksheet." By filling out this plan, you and your team will create a plan for all the yummy yummy content, both yours and that of other people, that you'll need to fill your social media pipeline.

# SURVEY OFFER

## CLAIM YOUR \$5 REBATE! HERE'S HOW -

- Visit <http://jmlinks.com/survey>.
- Take a short, simple survey about the book.
- Indicate whether you want a \$5 rebate or want to make a contribution to our scholarship fund.



## WE WILL THEN -

- Rebate you the \$5, or thank you profusely for helping a deserving young marketer.

**~ \$5 REBATE OFFER ~**

**~ LIMITED TO ONE PER CUSTOMER ~**

**EXPIRES: 3/1/2018**

**SUBJECT TO CHANGE WITHOUT NOTICE**

**GOT QUESTIONS? CALL 800-298-4065**



# 3

## FACEBOOK

**Facebook** is a great place to begin your Social Media Marketing journey! Let me give you four good reasons.

First, Facebook is – by far – the **largest social media platform**, with nearly two billion active users and countless profiles, Pages, and groups. Nearly every person has a Facebook account (“profile”), many businesses have Pages, and survey after survey ranks Facebook as the most used social media platform. The question is not whether your customers are on Facebook, but rather what are they doing, and how you can brainstorm a social media strategy to reach them.

Second, once you **understand the dynamics of Facebook** – *Profiles and Pages, Timelines and Posts, Likes, Comments, and Shares...* you’ll more easily **understand the dynamics of other social media** like LinkedIn, Twitter, or Instagram.

Third, Facebook has a component in its **algorithm** (called colloquially *Edgerank*), which essentially **rewards** you for posting items that users interact with (as measured by *likes, comments, and shares*). Understanding what *Edgerank* is, and how to improve your *Edgerank* will help you be a better marketer on Facebook. Understanding *Edgerank* will also help you market better on the other platforms, as all of them use something similar in their own proprietary algorithms.

Finally, Facebook is **fun!** Social media marketing should not be thought of as a chore, but as a way to get closer to your customers and build a community of evangelists around your company, product, or service.

**Let’s get started!**

## TODO LIST:

- » Explore how Facebook Works
- » Inventory Companies on Facebook
- » Understand the Importance of Like & Edgerank
- » Set up and Optimize Your Page
- » Brainstorm and Execute a Posting Strategy
- » Promote Your Facebook Page and Posts
- » Advertise on Facebook
- » Measure Your Results
- »» Checklist: Facebook Action Items
- »» Deliverable: a Facebook Marketing Plan

## » EXPLORE HOW FACEBOOK WORKS

To understand Facebook as a marketer is to understand the “F’s”: friends, family, fun, photos, and “fake.” Before you set up (or optimize) a Facebook Page for your business, before you start posting, before you start advertising, and before you start measuring your successes and failures, take some time to research how Facebook works.

*What are people doing on Facebook? Why do they like it? What are they sharing and interacting with? Are your customers on it, and if so, what are they doing? How might you interact with customers in a compelling, fun and non-obtrusive way?*

First, I’m assuming you have a personal Facebook profile; *if not*, simply go to <https://www.facebook.com/> and sign up. Facebook has a wonderful help section at <https://www.facebook.com/help/> - just click on “get started on Facebook.” Once you sign up – as an individual – you’ll have a **profile**.

Next, I’m assuming you have a few friends and family. (*If not, find some – friends are good*). Send them “friend requests,” and vice-versa. Next, post some photos of your

family, your dog, your trip to Las Vegas or whatever to your “timeline,” and when you login to Facebook on your desktop or your phone, look at your “news feed.” Your news feed will show you the posts of the friends and family with whom you are connected: when they post to their “timeline,” it will show in your “news feed” (with some caveats about *Edgerank*, more about this later). Similarly, when you post to your timeline, those posts will show on the news feed of your friends when / if they log into Facebook whether on their computers or their phones.

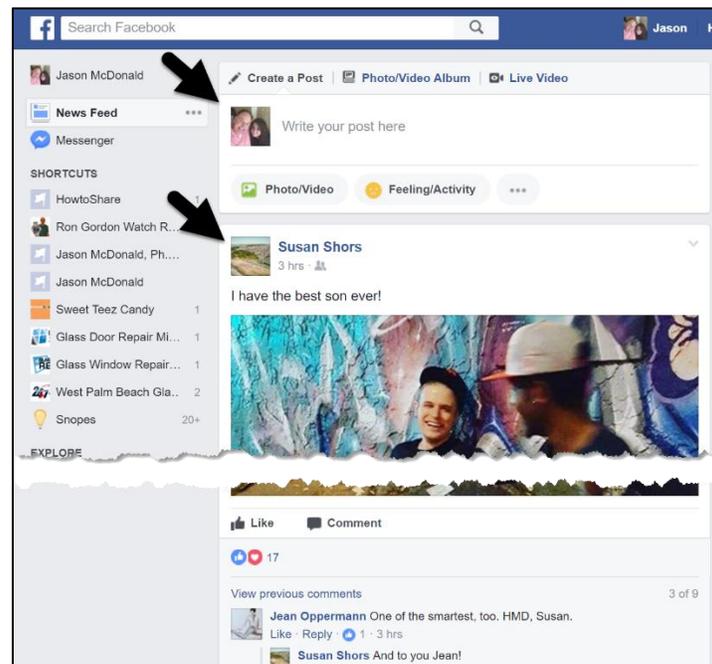
Here it is:

Susan and I are **friends** on Facebook.

Susan **posts** a picture of her son and his friend on her Facebook **timeline**.

I see that picture when I log in on my Facebook **news feed**.

Here’s a screenshot, with the first arrow pointing to my “timeline,” where I can share a status update with text and/or photos with my friends, and second arrow pointing to my “news feed,” where I see what my friends or contacts (such as Susan) have shared:



99% of the activity, both on the desktop and on the phone occurs in the news feed. People “login” to Facebook and see a streaming feed of photos, videos, and text posts by friends and family. And, if they post to their own timeline, the reverse happens: their post shows up in the news feed of friends and family connections on Facebook.

## Facebook as Social Scrapbook

Essentially Facebook is a **huge interactive scrapbook**. You post photos and writings to your *timeline*, and your friends and family see them in their *news feed*, where they can like, comment, or share them. And vice-versa: your friends post to their timeline, and you see it in your news feed. Facebook is also like a big family and friends party: 24/7. People post messages about their lives and families, social events, causes they like/dislike, etc.

## The Five F’s: Friends, Family, Fun, Photos, and Fake

Pay attention to what people are sharing on Facebook. Generally, you’ll see it falls into the themes of friends, family, fun, photos, and fake:

- **Friends, Fun, Family.** Whether shared in photo format, as an image, as a video, or just as plain text, Facebook is a place where people share stuff about their friends and family.
- **Photos.** Photos dominate Facebook! Photos of friends at the beach, at Disneyland, graduating from High School, new babies. People are constantly posting photos with short commentaries, generally about friends, family, and fun. Video content, while less common, is even more engaging. *Facebook Live* allows people to post videos in real-time.
- **Fake.** As we will discuss in a moment in more detail, Facebook is often “fake.” People share the happy and successful moments of their lives, but not so much the sad and unsuccessful events.

And -

- **Games, Social Contests, Groups.** For some people, Facebook is a place for social games. There are also groups on Facebook which allow people to collaborate and communicate, as for example a “group” of people taking a High School class in US History or a “group” of people who share a passion for duck hunting.

- **Social Causes, Politics, and Endorsements.** People often “endorse” causes they care about (e.g., Breast Cancer awareness, Gay & Lesbian issues, Save the Whales) and share “outrage” about issues that they disagree with. Some people relish arguing about politics, as well, while many others wish that we could keep politics out of Facebook!
- **News & Commentary.** Increasingly, Facebook is becoming a major source of news. Thus, people log in, and see news posts (often by the media, often shared by friends), and “like,” “comment,” or “share” these news items.

So, next, using your own personal Facebook account, spend some quality time (ideally with your marketing team), just bopping around Facebook, observing what people are “doing” at this party. The marketing goal is to understand the *vibe* or *culture*, of Facebook so that your company’s marketing message can blend in and build on this culture to nurture your brand image, grow your customer connections, and ultimately sell more stuff.

**Research** *a) whether your customers are on Facebook, b) what they are posting, liking, commenting on, and/or sharing, and c) what companies like yours are doing on Facebook that connects to potential customers.*

Although you may already think you “know” how to use Facebook, it’s worth engaging in this exercise of looking at Facebook from 30,000 feet above. Many companies, for example, will post boring B2B content on Facebook, and then conclude Facebook doesn’t work. Or they’ll spam Facebook with posts that yell, “Buy our stuff now!” Yet if they had realized that the culture of Facebook is about friends, family, and fun, they would have posted content that resonated with fun-oriented themes, and succeeded.

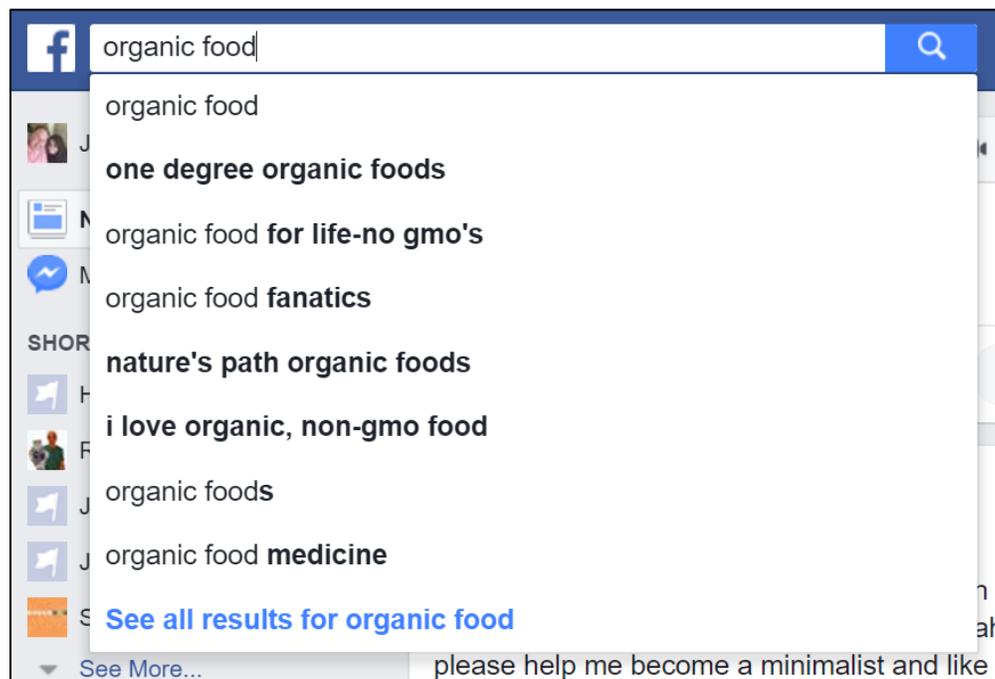
As you research Facebook, ask yourself these all-important questions:

1. Are your **customers** on Facebook?
2. If so, what are they doing? What’s **engaging** to them?
3. How can you **tailor your marketing message** so that it seems “natural” given Facebook’s focus on friends, family, and fun?

I know I am belaboring the point here. However, I can't count the corporate trainings and workshops I have given in which it comes as a REVELATION that the corporate marketing message has to somehow connect to friends, family, and/or fun to work on Facebook!

## Searching Facebook for Posts

With your keyword themes in hand, find out if people are posting and talking about your keywords on Facebook. To do so, first enter a keyword into the search bar at the top of the Facebook screen. You'll see *Search Facebook* in gray text. Next, click on the bottom phrase *See all results for {your keyword}* in blue. Here's a screenshot:



Next click on *posts* which you'll see in the tabs across the top. Scroll down and you'll see posts by friends as well as public posts on these keywords. At this point start to ask yourself, "What is this conversation about?" and "How could our company participate in this conversation in a meaningful way that also showcases our brand?". You'll often see a lot of posts by brands on Facebook, but pay attention to the likes, comments, and shares of individual posts to gauge whether real customers are actually engaged in this conversation.

## **Facebook and Fake**

Notice, also, that Facebook is also about “fake.” By “fake,” I mean that people generally do not share embarrassing news on Facebook. People are very likely to share photos of their family trip to Disneyland, their new Labrador puppy, or their endorsement of the San Francisco Red Cross. If they climb Mount Everest, you can be sure they’ll take a selfie at the summit and post it to Facebook. They are not likely, however, to share news about their family struggles, their pending divorce, or their shameful addiction to candy corn and weight problems. To listen to an incredibly informative podcast on how the “fake” of Facebook can impact your own psychology, check out <http://jmlinks.com/29v>.

In general, people put their best foot forward on Facebook: it’s a social scrapbook in many ways about how life “should” be, rather than how life “is.”

## **Your Specific Customers**

As you begin to categorize what people are posting and the tone of these posts, try to conceptualize not just Facebook’s general culture but the specific tone or culture of your target customers. If you sell to High Schoolers, you’ll find a different tone than if you sell to middle age women who are passionate about knitting, and still another tone if you sell to people passionate about outdoor camping and fishing. Each social medium is different, and you’ll quickly realize that if LinkedIn is a serious platform for job searches and business-to-business information, Facebook is a fun platform for sharing photos with friends and family; even its subcultures focus on friends, family, fun, and fake albeit with different nuances in tone.

Once you grasp that Facebook is friends, family, fun, photos, and fake (in general), and once you grasp the unique tone of your target customers, you’ll be better positioned to brainstorm how to take your company or brand and make the message fit the medium.

## **Are You a Fun Company or Not Fun Company?**

If you’re Airbnb selling “fun” services like hotels and travel, this can be pretty easy. If you’re a varicose vein clinic, this may not be quite so easy, nor will it be easy if you’re a CPA or a divorce attorney. If you’re a “fun” company in a “fun” and “photogenic” industry, you’ll find Facebook easy. If you’re a “not fun” company in a “not fun” industry, you’ll

have to think outside the box. You'll have to look for **adjacent themes** and attach your brand image to those adjacent themes.

Look deep into your company's soul, and ask yourself which Facebook strategy makes the most conceptual sense:

Are you a **fun company** in a **fun** and **photogenic industry**? If so, post fun photos of your product or service. (Example: REI at <https://www.facebook.com/REI/>).

Or, are you a **not-fun company** *adjacent* to a fun and photogenic industry? If so, post photos of "fun" things adjacent to your product or service. (Example: AeroMexico airlines at <https://www.facebook.com/AeromexicoNA/> – in which the service itself (*air travel*) isn't nearly as much fun as the adjacent activity (*tourism*)).

Or, are you a **not-fun company** in a **not-fun industry**? If so, you'll have to think out of the box on how to post to Facebook. (Example: Progressive Insurance at <https://www.facebook.com/progressive/> which posts lots and lots of content that has little to do with insurance, directly).

Not all products or services will work on Facebook; that's OK, too, as your mission is to identify which social media networks work most easily for your company and focus on those.

## Dentistry Can Be Fun

It's easy to see how a fun company in a fun industry like REI can succeed on Facebook, but let's dig into a not-fun company in a not-fun industry. For example, take a look at the Super Dentists page at Facebook at <http://jmlinks.com/12x>. Now, dental work isn't exactly fun, is it? Who enjoys getting their teeth cleaned, getting a filling fixed, or having a root canal? Not many of us. The Super Dentists on Facebook, accordingly, is not a Facebook Page about the "serious" side of dentistry, something we all know is "good for us" but we don't exactly enjoy. Rather, their Page is about *fun, fun, fun, fun*, and then an occasional post about something serious with respect to dental care.

**Question:** The Super Dentists are a “not fun” company in a “not fun” industry that has cleverly molded their Facebook message into something fun and engaging, thus fitting into the vibe of Facebook. What are **adjacent**, fun keywords or themes that connect to your product or service?

Here’s a screenshot and link:



Visit <http://jmlinks.com/12x> and browse some of their most current posts. Notice that they post a lot of “fun” posts and just a few “serious” posts about the importance of good dental care.

## What about Your Company and Your Customers?

Returning to Facebook, here are some questions to ask yourself as you investigate the social media giant:

- Are your target customers on Facebook in any capacity?
- If so, are they engaging in topics that directly touch on your company's brand objectives or are they only indirectly touching on those elements?
- What types of posts are your potential customers posting, liking, commenting on, and sharing? Which ones seem to be the most successful in generating interaction, and which the least?
- What are your competitors doing that seems to be working as measured by likes, comments, and shares? (*Be careful with competitors – if they are posting a lot but getting little engagement, that's a sign that their strategy is NOT working*).
- What are other companies that are not competitors yet might act as models for your Facebook strategy doing, and what is working for them? Why or why not?

If you see your customers on Facebook and you see a way to “connect” with keyword themes that they care about, Facebook should be a high priority for you. If you research Facebook, and do not see your customers there, or you do not see a connection between your company's brand objectives and keyword themes being shared on Facebook, then it may not be a high priority for you.

### » MAKE AN INVENTORY OF LIKES & DISLIKES ON FACEBOOK

Assuming you see potential in Facebook, it's time to dig deeper. But before you dig further into the technical details of setting up your own Facebook Page and optimizing your posts, it's incredibly important to make a list of companies (whether competitors or more general consumer brands) that you admire on Facebook. You want to monitor them, and reverse engineer what they're doing that's working.

*Imitation is the highest form of flattery, and identifying successful brands to reverse engineer is the easiest way to master marketing on Facebook.*

So, now we are going to shift gears from **profiles** (individuals) to **Pages** (companies). You'll want to identify companies that are on Facebook, and reverse engineer their marketing strategy.

How do you find companies to “like” on Facebook?

Answer: By understanding how to be a power Facebook searcher.

## Ways to Search Facebook

First identify the **keyword themes** that matter to you and your potential customers. For example, if you are a maker of organic baby food, you would use the key phrases “organic food” and “baby food” to identify companies that are already on Facebook. If you are a company that organizes bird-watching tours, then you'll be searching Facebook for keywords like “birding,” “birding tourism,” or perhaps “ecotourism.” As you find companies that seem to be doing a good job with Facebook marketing, you'll be making an inventory of what you like / dislike about their Facebook marketing in terms of their cover photo, profile picture, tabs, and their posting strategy above all else. Remember: if you're going to throw a party, you'll inventory the party theme, decorations, invitations, and all the things you like / dislike to make an inventory for your own party planning.

**VIDEO.** Watch a video tutorial on how to search Facebook for social media marketing at <http://jmlinks.com/16h>.

Your **TODOS** here are to identify companies that seem to “get” Facebook, and to inventory what you like or dislike about how they have set up their Facebook Page, and how they are posting content to Facebook.

Returning to the first step, here are the two best ways to find commercial Pages to inventory for your Facebook marketing plan:

**Method #1 Search Facebook Directly.** Simply type into the search box your keyword as in “organic food.” Next at the top tab click on “Pages.” Facebook is not the most elegant search engine (it's Facebook, and not Google). But in this way you can find Pages to browse in your industry. Here are screenshots:

The screenshot shows a web browser window with the address bar displaying "https://www.facebook.com/search/top/?q=organic%20food". The Facebook search bar contains the text "organic food". The navigation tabs at the top include "All", "Posts", "People", "Photos", "Videos", "Pages" (which is highlighted with a black box), "Places", "Groups", and "Apps".

On the left side, there is a "Filter Results" sidebar with three sections:

- POSTED BY**
  - Anyone
  - You
  - Your Friends
  - Your Friends and Groups
  - Choose a Source...
- POSTED IN GROUP**
  - Any group
  - Your Groups
  - Choose a Group...
- TAGGED LOCATION**
  - Anywhere

The main content area displays a list of pages under the heading "Pages" with a "See All" link. The first three results are:

- Organic Food**: Health & Wellness Website · 40K like this. Includes a "Learn More" button and a "Like" button. Description: [Organic food](#) suggestions.
- Organic Food Fanatics**: Magazine · 142K like this. Includes a "Like" button. Description: Inform yourself of the healthy [food](#) you consume.
- Organic Live Food**: Community Organization · 9.4K like this. Includes a "Send Message" button and a "Like" button. Description: We provide health info regarding [organic food](#), nutritional facts 4improving health, raw foods, superfoods, herbal remedies, GMO...

A "See All" link is located at the bottom of the page list.

And then after you click “Pages,” you’ll see:

The screenshot shows a Facebook search interface for the term "organic food". The search results are filtered to show "Pages". On the left, a "Filter Results" sidebar is visible with the following sections:

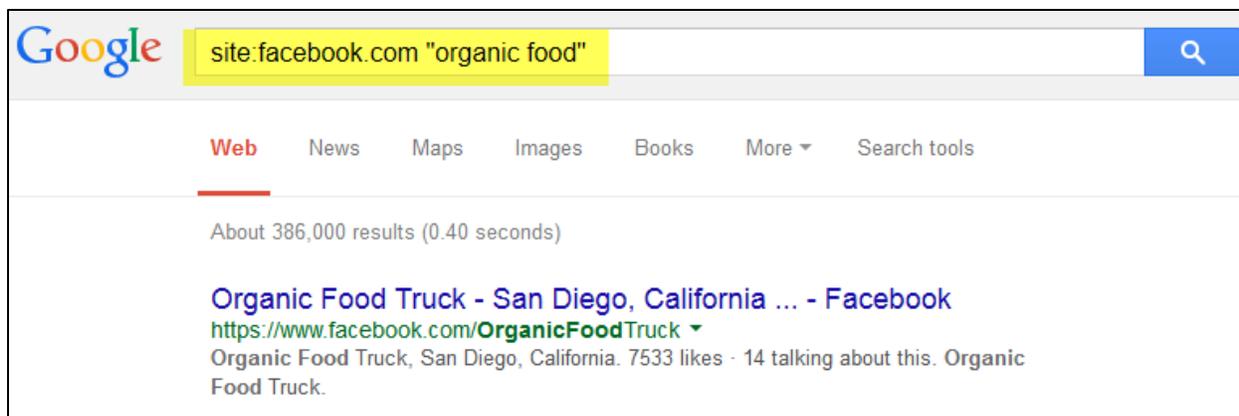
- LIKED BY FRIENDS:**  Liked by Friends
- VERIFIED:**  Verified
- CATEGORY:**
  - Any category
  - Local Business or Place
  - Company, Organization or Institution
  - Brand or Product
  - Artist, Band or Public Figure
  - Entertainment
  - Cause or Community

The main content area displays four search results:

- Organic Food:** Health & Wellness Website · 40K like this. Includes a "Learn More" button and a "Like" button.
- Organic Food Fanatics:** Magazine · 142K like this. Includes a "Like" button. Description: "Inform yourself of the healthy food you consume."
- Organic Live Food:** Community Organization · 9.4K like this. Includes "Send Message" and "Like" buttons. Description: "We provide health info regarding organicfood, nutritional facts 4improving health, raw foods, superfoods, herbal remedies, GMO..."
- Organic Food Organization:** Health/Beauty · 124K like this. Includes a "Like" button. Description: "You can get your daily health info here."

You'll see a list of relevant commercial Pages. You can click on each one, identify companies that seem to "get" Facebook, "like" them in your personal profile (so you can keep an eye on them), and begin to inventory your likes / dislikes.

**Method #2** Identify Facebook Pages via Google Search. Go to Google (<https://www.google.com/>). Type into the Google search box site:facebook.com "organic food". (Note: use quotation marks around multi-word phrases for best results). Google will then return to you a list of commercial Pages on Facebook with that term in it. To see this in action, go to <http://jmlinks.com/2i>. Here's a screenshot:



It's very important that there be no space between *site* and *the colon*. It's *site:facebook.com* not *site: facebook.com*. You can use this tactic on Google for any social media; as for example, *site:yelp.com massage therapists boston*, or *site:twitter.com industrial fans*. Once you know your keyword themes, using Google in this fashion is a great way to browse a social media to find relevant companies to reverse engineer.

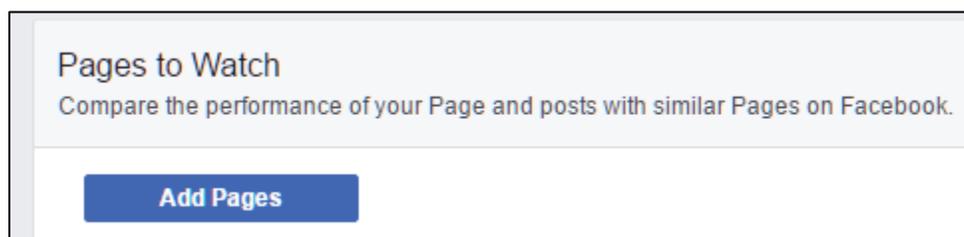
To see this in action, go to <http://jmlinks.com/2i>.

**VIDEO.** Watch a video tutorial on how to use the *site:* command to search Facebook for social media marketing at <http://jmlinks.com/16g>.

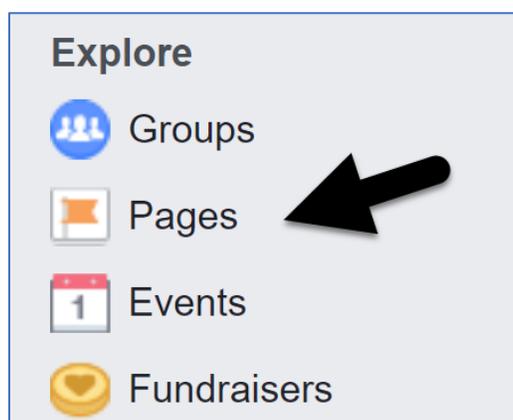
## IDENTIFY COMPANIES WHO DO FACEBOOK WELL AND INVENTORY THEM

Don't be afraid to "like" companies via Facebook (even your competitors). In fact, I strongly encourage it: by "liking" companies you actually "like," you'll experience them marketing to you, and you can then reverse engineer this for your own company. Indeed, Facebook itself encourages companies to "spy" on other companies. Once you've set up a Page for your company, for example, click on the Insights tab, and Facebook will suggest companies similar to your own to monitor. Simply click on on "Pages to watch."

Here's a screenshot:



Returning to the regular Facebook interface, once you "like" a company, its posts will show up in your news feed (depending on *Edgerank*). However, Facebook gives priority to posts by humans (friends and family), so to find posts from brands you have liked, scan the left column of Facebook and look for a link under *Explore > Pages*. Click on that, and you'll see posts from companies that you have liked. Here's a screenshot:



You can also click on *Explore > Pages Feed* to go directly to posts by Pages that you have liked. If you are logged into Facebook, you can also click on this link - <http://jmlinks.com/29w> - to go directly there.

For your second **TODO**, download the **Facebook Research Worksheet**. For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code ‘**2018social**’ to register if you have not already done so), and click on the link to the “Facebook Research Worksheet.” You’ll answer questions as to whether your potential customers are on Facebook, identify brands to follow, and inventory what you like and dislike about their Facebook set up and marketing strategy.

## » UNDERSTAND THE IMPORTANCE OF LIKE AND EDGERANK

To market successfully on Facebook, you need a detailed understanding of its **structure** and how it works. Most importantly, you need to understand the difference between a profile and a Page, and what “like” means vis-a-vis a Page and/or a post, as well as *comment* and *share*.

For your inventory, you’ll need to know some vocabulary about what is what on Facebook. Here’s a synopsis:

- **People have “profiles.”** This is *Jason McDonald*, a real person, for example. I have a *profile* (not a *Page*) on Facebook.
- **When two people “friend” each other by exchanging a “friend request,” Facebook puts them in a “like” relationship.** If I “friend” my friend, Tom Jones, and he accepts this request, then he and I are connected via Facebook.
- **When two profiles are connected, if person A posts to his timeline, person B will see that post on his news feed** (with the *Edgerank* or *Facebook algorithm* caveat that the news feed can be very busy, and Facebook prioritizes the posts of friends with whom you interact over those whom you ignore).
  - **People interact with a post** by “liking” the post, “commenting” on the post, and/or “sharing” the post, thereby essentially re-posting it to their own timeline so that their own friends can see / interact with the post. In the background, Facebook **Edgerank** keeps track of which profiles, Pages, and posts are the most interactive, and favors them in the news feed across the social network.

- **Companies have Pages, not profiles.** A *profile* (person) creates a *Page* (company) and then manages it as an Admin. A Facebook Page can (and should)
- have more than one Admin. The *Page* for the JM Internet Group (<https://www.facebook.com/jm.internet>) is managed by me (a *profile*) for example.
  - Pages can NOT exist without sponsorship by at least one profile!
  - Any Admin can delete / change / post to a Page!
  - Therefore, have at least two reliable, trustworthy Page Admins at all times.
  - Before you fire someone, REMOVE him or her as a Page Admin!
- **When a person (“profile”) “likes” a business “Page” that creates a Facebook relationship between the “profile” and the “Page.”** When I “like” Safeway (<https://www.facebook.com/Safeway>), that means that when Safeway posts to its timeline, it might show on my news feed. By “liking” Safeway, I have given it permission to talk to me via Facebook.
  - **People interact with a post** by a Page by “liking” the post, “commenting” on the post, and/or “sharing” the post, thereby essentially re-posting it to their own timeline so that their own friends can see / interact with the post. In the background, Facebook *Edgerank* keeps track of which posts are the most interactive, and favors them in the news feed across the social network.

To read the Facebook help files on setting up a business Page, go to <http://jmlinks.com/1c>. Note that you can technically create not just “Pages” for local businesses or places, companies, organizations, or institutions, and brands or products. You can create “public figure Pages” for artists, bands, or public figures (think CEO of your company, a la Martha Stewart), or even Pages for causes or communities. For most companies, you’ll choose either the local business option, the company option, or the brand / product option. To see the options, go to <http://jmlinks.com/29x>.

## It Gets Complicated

Here’s where it gets complicated. Remember our Social Media Marketing goals? Among them: staying top of mind and encouraging social sharing? *Edgerank*, which is part of the Facebook algorithm, intervenes at this point. When a Page posts to its timeline, that post will show up on the news feed of “profiles” (people) who have liked it based on several factors:

- The individual (a.k.a., “the profile”) must have “liked” the Page in advance.

- If the individual previously “liked” the Page, and generally “liked” posts by the Page and/or commented on them and/or shared them, then the *Edgerank* of that Page is improved. The higher the *Edgerank* (based on more interaction between me and that Page), the more likely it is that the post by the Page will show in my timeline.
- A real-time analysis of the post: the faster and wider a post gets interactivity (likes, comments, and shares), the larger its Edgerank and it, therefore, gets even more publicity.

In essence, Facebook monitors whether users interact with the posts of a Page: the more users who interact with the posts of a Page, the higher the Edgerank of that Page and its posts, and the more likely users are to continue to see posts by the Page in their news feed.

### **Edgerank is Dead. Long Live Edgerank!**

You are going to read on the blogosphere that Edgerank is “dead,” that Facebook replaced it with a machine learning algorithm in about 2011 (See <http://jmlinks.com/29z>). Technically, that’s true. But – and it’s a very big but – Facebook continues to use its algorithm to “score” the relationship between a Page and a Profile, that is between a brand and a person, down to the level of a given post.

### **That Which You Call a Rose...**

*Whatever you call it, Edgerank or the Facebook algorithm, Facebook clearly scores your Page and its Posts. The more interactive those two are, the more likely it is that users will see your posts in their news feeds. The point is to realize that the Facebook algorithm is there, in the background, using AI (Artificial Intelligence) to promote what’s interesting and bury what’s not.*

If you as a Page post something to your timeline, how likely is it that a fan of your page, or Profile, is going to see it in his or her news feed? The likelihood that a person will see your post is the result of a basic structural factor (i.e., *that the person already likes your Page*), and some dynamic factors, such as –

- Content that generates a lot of likes...
  - Content that generates a lot of comments...
  - Content that generates a lot of shares...
- Etc. See <http://jmlinks.com/29y>.

The long and short of the Facebook algorithm as a marketer is the *more interactive* a post is, *the more* it will show in the news feeds of your fans. Hence:

**Encouraging interactivity is the #1 goal of your Facebook marketing!**

To use an example, let's look at the Mayo Clinic and me on Facebook.

1. I “like” the Mayo Clinic Page on Facebook (<https://www.facebook.com/MayoClinic>), giving it permission to talk to me via Facebook.
2. The Mayo Clinic posts images, photos, blog post summaries, etc., to its Facebook Page timeline, such as tips on how to live healthy, information on diseases, and even information on how to keep your pets healthy.
3. I “like” these posts, I “comment” on these posts (“*Oh, yes, I am going to eat more kale!*”), and even better I “share” these posts on my own timeline by clicking the share button.

Here's a screenshot of a post by the Mayo Clinic appearing on my Facebook news feed. I have highlighted the like / comment / share buttons at the bottom, showing that this post was highly successful: 142 people clicked “like,” 5 made comments, and 42 shared it in the six hours since they posted it and I saw it on my news feed!



Mayo Clinic

6 hrs · 🌐



Obstructive sleep apnea, night sweats and hot flashes make for a poor night's sleep. Researchers found that for middle-aged women, there may be a connection. <http://mayocl.in/2gRQWvX>



### Research finds hot flashes, night sweats connected to obstructive sleep apnea risk women

"Hot flashes and night sweats may be overlooked as a risk of something more serious," says Dr. Faubion.

[NEWSNETWORK.MAYOCLINIC.ORG](http://NEWSNETWORK.MAYOCLINIC.ORG)



104

Top Comments ▾

42 Shares



Write a comment...



**Sharon Payne Cornthwait** I was put on cpap due to low oxygen levels when I turned on my left side. Since then my night sweats and nightmare panics have ceased. I commented to my doctor I had no doubt now that low oxygen caused both.

Like · Reply · 👍 2 · 5 hrs



**Eileen Burroughs Shipman** Love my CPAP machine. Did have night sweats and never connected it to sleep apnea until now.

Like · Reply · 2 hrs

[View 3 more comments](#)

Compare this post to a post by REI on project to pick up trash across America's highways – with 257,000 views, 3,600 likes, and 669 shares:

**REI with GearJunkie.** October 25 at 10:00am · Paid · 🌐

On average, there are more than 5,000 pieces of litter on every mile of U.S. roads. REI members Seth and Abby decided to do something about that. They jumped on Co-op Cycles bikes and spent 5 months bikepacking across the U.S., picking up hundreds of pounds of garbage on roads and campsites along the way. We collaborated with GearJunkie on a video to tell their story. Watch the full video here: <http://bit.ly/2yJB60T>.

**HOW FAR WOULD YOU GO TO MAKE A DIFFERENCE?**

257K Views

Like Comment Share

3.6K

669 Shares

Write a comment...

**Patricia L. Johnson** Love it! Yay REI for supporting this. 😊

Like · Reply · 5 · October 26 at 6:23am

In both cases, **social resonance** encourages likes, comments, and shares. And notice how in both cases the posts have interesting text, provocative photographs, and links to a blog post or video. By *design* the posts are meant to engage the audience.

Returning to my relationship with the Mayo Clinic post. By “liking,” “commenting,” or “sharing” this post, I, too, am telling Facebook I am engaged with the Mayo Clinic Page.

*The more I do this, the more I will see its posts in my news feed.*

Now, flip this around as marketers, your goals become:

- To increase your *Edgerank*, or your *Facebook algorithm score* to be more semantically correct, (and the probability that people will see your posts in their news feed), you **MUST** get more likes, comments, and shares of your posts!
- To increase your *Edgerank*, you must get **interactivity!**

Encouraging interactivity is the name of the game when it comes to Facebook marketing. Oh, and if you’re asking whether people can do more than just “like” by clicking those crazy new icons on Facebook – of course you want that.

## INTERACTIVITY IS GOAL #1 FOR YOUR FACEBOOK POSTS

**Posting strategy** is all about what you post, and using those posts to drive up interactivity, and improve your Edgerank. So, first you’ve used content marketing to identify the types of content that interests your target customers, second, you’ve created photos, videos, and written blog posts that connect “what you have” with “what they’re interested in.” Now you want to think about packaging that content in such a way that it spurs them to like, comment, and/or share that content on Facebook.

What drives people to interactivity? The answer is, first and foremost, **emotion**. Anything that sparks an emotional reaction of “how shocking,” or “Oh my gosh I didn’t know that,” or “I heartily agree with that idea,” or “*Aw, shucks, I love puppies and babies and mommies and support our troops too and I hate pollution and bad people and criminals and scams...*” Anything that provokes an emotional reaction, especially one that inclines a person to click “YES! I agree,” is what you’re after. Oh, and **utility** is good, too, like “the secret to poaching eggs” (*Don’t use vinegar despite what you see on YouTube, seriously*)... or something **counterintuitive** (like, *you’ve been using that lemon juicer backwards for all these years*)... is also likely to work. In fact, I actually did post a video when my Mom and Dad showed me I was using the lemon juicer backwards for all these years. Here’s a screenshot:



The point, as a marketer, is to realize that our posts – not just on Facebook but to all social media marketing – need to be emotional, useful, and/or counterintuitive. People interact with and share “man bites dog” not “dog bites man.”

Here are example categories of posts that are likely to spur customer interactions:

- **Sentimental Posts.** Posts of kittens and puppies, posts of kids, posts of moms and dads, posts of moms and dads holding kittens and puppies. Posts about the 4<sup>th</sup> of July, posts about how much you love a cause... Brands on Facebook often post “sentimentality bait”: posts that people click “like” on to indicate that they “agree” with the cause. So every Mother’s Day, you can see brands posting pictures of mothers and their kids, and people clicking “like” on these posts because the “like” their mothers... which is increasing the Edgerank of these Pages.
- **Utility.** Posts that explain “how to do” stuff, especially things that are counterintuitive or funny. Such as “Ten Ways Not to Ask a Girl Out,” or “Five New Ways to Lose Weight While on a Vacation.”
- **Counterintuitive.** Posts that take things you “think” you know, and explain that they don’t really work like you think they do. Especially common are things that people “think” are safe, but in fact are dangerous such as rawhide dog chews (*who knew that they were dangerous?*).
- **Funny.** Humor is big on Facebook. Posting jokes, funny quotes, videos, images (memes), etc. Things that make people laugh, get them to click like, comment, or share. Queue the funny babies, babies with dogs, and of course cat videos.
- **Surveys, Polls, Contests.** Asking your audience a question, and getting them to use the comments as a way to interact with that. *Take this quiz and learn which Star Trek character best describes your love life.*
- **Quotes.** Sentimental, humorous, make-you-think quotes, especially when hoisted on top of picturesque and contemplative scenery like mountains or fuzzified people. *Do or do not. There is no try – Yoda from Star Wars.*
- **Outrage.** Things that make people mad: mad enough to comment, “like” in the sense of opposing the thing that outrages them, and even share. Outrage is very big on Facebook, and brands (rather cynically) leverage this outrage to increase their Edgerank. *Click “like” if you think dolphins shouldn’t die in Tuna nets, animals shouldn’t be abused, etc., for example.*
- **Controversy.** Controversy, but in a good way, can be very good for your posts to Facebook. For example, avoid posting touchy subjects like abortion or gun control, but do post on “fun” controversies such as *“Is a bikini or a one-piece a better bathing suit?”*, *“Is it OK not to serve turkey on Thanksgiving,”* or *“Which is better a cat or a dog?”*

Thus, in terms of **posting strategy**, brands will post items that are specifically engineered to increase engagement and thereby increase their *Edgerank*. Look back at the brands you like, and begin to notice how they are using the strategies above to increase interaction.

## FACEBOOK REWARDS YOU FOR INTERACTIVE POSTS

Here are some brands that I admire in terms of their Facebook marketing, all of which build Edgerank by sharing interactive content on a regular basis:

**Bishop Robert Barron** (<https://www.facebook.com/BishopRobertBarron>) – known as the Catholic social media superstar, Bishop Barron shares history and theological insights, and shows how something as ancient as Catholicism can leverage new media to grow its reach and build its brand.

**Navy Federal Credit Union** (<https://www.facebook.com/NavyFederal>) – if you monitor its Page, you’ll see a steady dose of sentimentality, especially pictures of military men with babies (a double whammy: *yes, I support our troops, and, yes, I like babies!*).

**The Super Dentists** (<https://www.facebook.com/TheSuperDentists>) – similarly to Metamucil, this San Diego kids dentists takes something not-so-fun (dentistry) and effectively builds eWom, one-touch-to-many, and even social sharing via pictures, contests, sentimentality posts and the like.

**REI** (<https://www.facebook.com/REI>). REI is an outdoor, sports retailer and uses Facebook to share “how to” information about hiking, campaign, and other outdoor sports, promote its products, and build a community around people who like the outdoors (and love its products).

**The White House** (<https://www.facebook.com/WhiteHouse>) – like him, hate him, I don't care, Donald Trump certainly believes in social media (especially Twitter), and you can learn a ton from watching how his White House uses Facebook to spread its message, grow its political base, and just generally participate in the social milieu.

**Taco Bell** (<https://www.facebook.com/tacobell>) – the edgy, youth brand is a master at building awareness, creating the “fourth meal” (just what obese America needed), and making factory food fun.

**Metamucil** (<https://www.facebook.com/MetamucilBrand/>) – there, I admit it. I use Metamucil! Any brand that can take something so private, and grow a Facebook page to 234, 000 fans, has got to be doing something right. “Reverse engineer” how a product you probably didn't think of as friends, family, and fun uses social media on a regular basis (pun intended).

Make a list of your own favorite brands, “like” them on Facebook, and constantly “reverse engineer” their marketing strategy. Imitation, after all, is the highest form of flattery.

## Posting Rhythm

Now the point of all this, as marketers, isn't that we really love babies and military personnel (although we probably do). It's to

- Increase our *Edgerank* to increase the probability that our Facebook fans will see our posts.
- Use our built-up *Edgerank* to propel posts that market our products or services into the news feeds of our fans, for free.

This gets to **posting rhythm**. Smart marketers will post ten or twenty “fun, fun, fun” posts to drive UP their Edgerank, and then one “buy my stuff” post that has a good chance of showing in the news feed. So the posting rhythm can be: *fun, fun, fun, fun, fun, fun, buy my stuff, fun, fun, fun, fun, fun, fun*.

# FUN, FUN, FUN, BUY MY STUFF

## **Get Your Fans to Share**

Even better, business Pages on Facebook will post items that their fans are likely to share with their own friends. If you post something to your Facebook Page (e.g., a contest to win a free week's supply of your products or a quote that is inspiring), and your Facebook fans share it with their friends and family, well, you've hit a home run. Why? Because Facebook (and people) pay a heck of a lot more attention to posts by people than to posts by Pages. So by all means, post stuff to your business Page that excites your fans so much that they do the sharing!

## **Give away Free Tacos to Encourage Massive Viral Shares**

As an example, here's a post by Taco Bell promoting "free" Tacos because of "stolen bases" during the 2017 World Series – 16,000 likes and 8,697 shares! Taco Bell announced that every time a base was stolen, they would give away free tacos.

Hence:

 **Taco Bell** Yesterday at 5:00am · 🌐

Today only! Score your free Doritos Locos Taco between 2-6 p.m. at participating locations while supplies last. Comment a friend that needs a free taco in their life.

No purch nec. Limit one per person.  
Terms: [Ta.co/StealABase](https://Ta.co/StealABase)



👍 Like    💬 Comment    ➦ Share    👤

   16K

8,697 Shares    [Top Comments](#) ▾

Now, that’s a lot of shares! Admittedly, Taco Bell has an enormous budget but the point is that this “free” promotion was used to create tons of “spontaneous” shares by fans of Taco Bell, thereby leveraging the “super fans” of Taco Bell to create viral buzz on Facebook. So ask yourself what is your “free Taco promotion” that your fans will take over the finish line (to mix sports metaphors)?

## Facebook Rewards Posts by People over Posts by Pages

The reason for this tactic is that the *Edgerank* of people is much, much higher than the *Edgerank* of company Pages. So, to the extent that you can create a post that will be shared on Facebook, you can get your fans to market your company's products. Don't think in terms of only the *Edgerank* of your Page, but in the *Edgerank* of your customer evangelists or superfans (those people who not only like your Page, but interact heavily with your posts by liking them, commenting on them, and even sharing them to their own friends and family).

Let me repeat that:

The *Edgerank* of people is much higher than the *Edgerank* of company Pages. **So getting your customers to share your posts is a fundamental component of an effective Facebook marketing strategy.**

To find out what's being shared in your industry, I recommend using Buzzsumo (<http://jmlinks.com/29j>). Enter a keyword phrase, and Buzzsumo will tell you the highest shared content on Facebook in the past year, month, week or even day.

For example, here's a post of a military dad with a baby by Navy Federal Credit Union that got 854 "likes," 15 "comments," and 43 "shares":

**Navy Federal Credit Union** with Timothy Jump and 2 others  
June 21 at 5:09am · 🌐

Tag your hero to wish him a Happy Father's Day!



Images used for representational purposes only. Do not imply government endorsement. #JoinTheFamily photo by Nancy R.

Like · Comment · Share

👍 854 people like this.

➦ 43 shares

Write a comment..

View all 15 comments

Most Relevant ▾

And here's a shameless "buy our stuff" post. Notice how few likes, comments, and shares it garnered:



If you reverse engineer what Navy Federal Credit Union is doing on Facebook, it's posting items to drive up interactivity (fun stuff), and then occasionally posting items that are aimed to sell its products or services (serious stuff). So their posting rhythm is:

*fun, fun, fun, fun, fun, fun, fun, fun, fun, fun, **buy our stuff**, fun, fun, fun, fun, fun, fun, fun, **buy our stuff**, fun, fun, fun, etc.*

There are two factors at work here:

***Edgerank***: improving the *Edgerank* of posts by a Page, improves the *Edgerank* of all its posts to some degree. (Note: this is also a reason to pay attention to the time of day, because *Edgerank* is determined “on the fly,” and if a post does well “out of the gate,” it will tend to do better over time).

**Social Sharing:** getting the fans of a Page to share the posts to their own friends and family.

Generally speaking, posts that are highly interactive get boosts on both measures. As you reverse engineer the posting strategy of competitors and/or brands you admire on Facebook, notice how they try to spur either one or both of the above.

**VIDEO.** Watch a video tutorial on how to identify and inventory competitors and companies to emulate on Facebook at <http://jmlinks.com/16q>.

## » SET UP AND OPTIMIZE YOUR FACEBOOK PAGE

Now that you've got the basics of Facebook down, it's time to set up or optimize your own company Page. A good way to do this is to compare / contrast Pages that you like and use your inventory list to identify Todos. So, comparing Taco Bell (<https://www.facebook.com/tacobell>) the White House (<https://www.facebook.com/WhiteHouse>), and The Super Dentists (<https://www.facebook.com/TheSuperDentists>), let's go down item by item to see things you need to do in terms of Facebook Page setup.

Login to your Facebook Page, and then use the top *settings* menu.

- **Page Roles > Admins.** Your Page needs at least one Admin (you), but I recommend more than one. Realize that anyone who is an Admin can post to the Page, and also delete any other Admins. Your Admins should be reliable, and if you ever part ways (e.g., fire them), be sure to remove them as an Admin. *Located under Settings > Page Roles*
- **General Settings** (*Located under Settings > General*)
  - **Visitor Posts.** This setting allows users to post to the Page as well as add photos or videos. Note that Taco Bell has this "on" (anyone can post to the Page) vs. the White House, which has this "off." If you trust your fans, turn it on. If you're concerned about spam and controversy, turn it off.
  - **Tagging Ability.** Similar to the above, allows users to "tag" others in photos.
  - **Page Moderation and Profanity Filter.** You can turn on filters that block naughty words like the "f" word, and/or enter specific words. If a user

attempts to post or comment using these words, they will be blocked from your Page.

- **Other items.** Scroll through the list, and you can find other miscellaneous items such as banned users, post attribution, and notifications. For most of these, the default settings are fine.
- **About Your Page.** *Click on the About Tab.* Fill out this information in detail.
- **Enable the Review Tab.** Local businesses, in particular, should enable the review tab and solicit reviews from happy customers on Facebook. To do so, go to *Settings > Edit Page > Add a Tab > Reviews.*
- **Tabs.** You can reorganize your “tabs” by clicking *Settings > Edit Page* and then you will see “Tabs” in the center. You can then drag and drop tabs to move them around, or create new ones. **Note:** you can use this feature to turn on the important Review Tab (allowing customers to review your business). Just scroll to the bottom and click “Add a tab.”

Here are a few more important set up issues:

- **Visitor Posts.** If you are confident that your user community will help your brand, I recommend turning this “on,” as this allows users to post information to your Page, and thereby encourages social sharing and spread. If you are worried about hostile or naughty users, turn this off. Taco Bell has this on; the White House has this off. You can see this by looking at their Facebook Pages, and notice that on Taco Bell’s it shows you a Post box and says “Write something on this page...”
- **Local Business Address.** If you enter a physical address (on the “about” tab) and your Page type is local business, then the **Review Tab** will be automatically enabled; if you don’t see it, go to *Settings > Edit Page > Tabs* and then “Add a Tab.” This allows users to review your Page and/or business. Turn it “on,” if you think reviews will help you. If mobile users are important, this will also enable them to “**check in**” when they are at your business – and remember, when they “check in,” Facebook will alert their friends (social sharing). (The Super Dentists (<https://www.facebook.com/TheSuperDentists>) has this on).
- **Call to Action Button.** This allows you to promote an action such as sign up for our newsletter, watch a video, etc. For an explanation, visit <http://jmlinks.com/1d>. Taco Bell has this set up for “use app.” Available actions are: *Book Now, Contact Us, Use App, Play Game, Shop Now, Sign Up, or Watch Video.*

**VIDEO.** Watch a video tutorial on how to optimize your Facebook Page settings at <http://jmlinks.com/16k>.

## Set up Your Cover Photo and Profile Picture

Now that you've completed the basic structural set up for your Page, it's time to think about the graphic elements: the **cover photo** and the **profile picture**. The cover photo, of course, is the long horizontal photo that visitors see when they visit your Page. The profile picture is the square box that identifies your Page, both when they visit your Page and as a small icon when you post something that shows in their news feed. If you pay attention to companies like Taco Bell, the White House, Navy Federal Credit Union and the like, you'll see that they systematically rotate their cover photos. When a new cover photo is uploaded, that creates a post and an opportunity to alert your fans. Any change in the cover photo in particular "broadcasts" that change to people who like the Page.

For the technical specifications on changing your cover photo and/or profile picture, visit <http://jmlinks.com/1e>. The cover photo in particular is an opportunity for fun, high-quality photos and for seasonal rotations. Follow a vendor like REI (<https://www.facebook.com/REI>), and you'll see not only seasonal rotation but also thematic unity among their cover photos on Twitter (<https://twitter.com/rei>), Facebook, Instagram (<https://instagram.com/rei/>), etc.

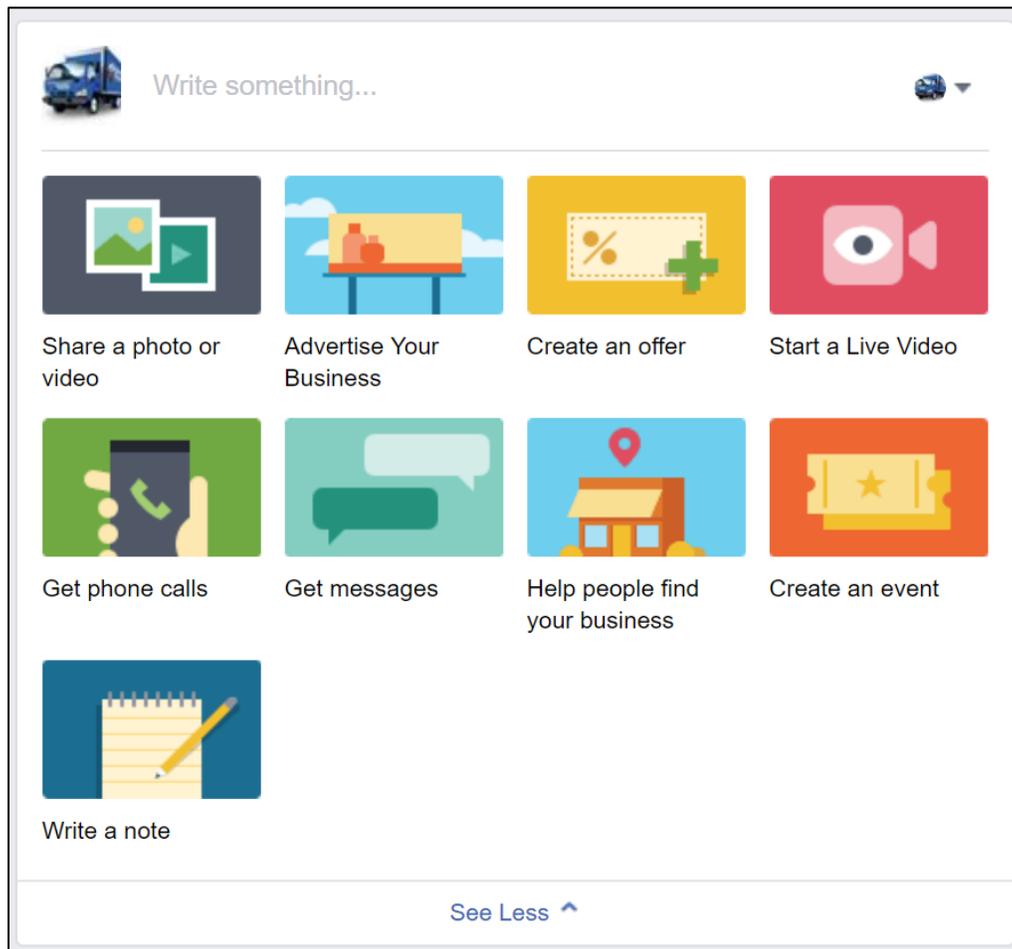
For your third **TODO**, download the **Facebook Setup Worksheet**. For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code '2018social' to register if you have not already done so), and click on the link to the "Facebook Setup Worksheet." You'll answer and outline the basic setup issues for your Facebook Page.

## » BRAINSTORM AND EXECUTE A POSTING STRATEGY

Now that you've set up your Facebook Page, you need to think about **content marketing** and your **posting strategy**. Remember that social media marketing stands or falls ultimately on the success of your content. You must systematically produce and share a ton of content to your Facebook page! A good goal is at least one post per day to your Facebook Page, if not two or even three.

## Choose a Strategy for Your Post

When you first log in to your Page, you'll see a matrix with at least eight visible choices. Some of these are "free" and some are "paid." Here's a screenshot:



You can just "write something" – meaning share a text post and then, if you like, add a photo or video to the post. You can also share a video directly, create an offer, start a live video, get phone calls, get messages, provide directions to your business, create an event, or even just "share a note." Most of the time you'll just type a message and add a video and/or photo, but Facebook is continually adding options.

Turn back to your Content Marketing plan, and remember you'll need both "other people's content" and "your own content" to post:

- **Photographs and Images.** Facebook is very visual, and you'll need to systematically identify photographs and images that fit with your brand message and ideally encourage likes, comments, and shares.
- **Blog Post Summaries.** To the extent that you have an active blog and are posting items that fit with friends, family, and fun, post headlines, short summaries and links to your blog.
  - Note that the first or "featured" image will become the shareable image, and that the META DESCRIPTION will become the default description when sharing. Choose striking, fun images for your blog posts!
- **Quotes.** People love quotes, and taking memorable quotes and pasting them on graphics is a win/win.
- **Infographics and Instructographics.** Factoids, how to articles, especially ones that are fun, are excellent for Facebook.
- **Quizzes, Surveys, and Response-provoking posts.** Ask a question, and get an answer or more. Great for encouraging interactivity.

Turn to the content marketing section of the *Social Media Toolbook* for a list of tools that will help you find other people's content and create your own. I recommend Hootsuite (<http://jmlinks.com/29k>) to manage all your social postings across platforms.

For your fourth **TODO**, download the **Facebook Posting Worksheet**. For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code '2018social' to register if you have not already done so), and click on the link to the "Facebook Posting Worksheet." You'll systematically built out a posting strategy based on other people's content and your own content.

Once you get this done, it's time to post. Remember that Facebook marketing requires a commitment of time and resources. You can even create an editorial calendar and assigned **TODOS** for your team so that every day you are posting to Facebook on a regular basis.

### **How frequently should you post?**

Because the Facebook news feed is very crowded, you can safely post quite frequently; even several times a day. But this differs with your audience, so pay attention using the Insights tab as to what posts get the best response, and whether the time of day matters. Pay attention as well to your Page likes and unlikes, to see if your posts are delighting or annoying your followers.

Experiment and measure, and you'll figure out a posting rhythm that works for you.

# POST 80% OR MORE ABOUT “FUN,” AND 20% OR LESS ABOUT “BUY MY STUFF.”

Don't forget that most of your posts (80% or more) should be about friends, family, and fun, and only a few (20% or less) should be direct pitches to buy your stuff. If you oversell your stuff, your *Edgerank* will suffer and your fans will unlike your Page.

Finally, you can “pin” a post to the top of your Page, so that it is the first post people will see when they visit your Page. Just click on the down chevron on the top right corner of Facebook, and select “Pin to top” to “pin” a post to the top of your Page.

Here's a screenshot:



## » PROMOTE YOUR FACEBOOK PAGE AND POSTS

Once you've set up your Page, and begun to populate it with posts on a regular basis, you've essentially "set up" your "party." You've created a good-looking Facebook Page for your business, and you're posting so frequently that when someone lands on the Page, they'll see there's a lot of interesting, fun content. These "trust indicators" will encourage them to "like" your Page, thereby allowing you to post to your timeline and thereby (hopefully) reach them when they check their news feed.

Now it's time to send out the "invitations," that is to promote your Facebook Page to users. In and of itself, a Facebook Page will not be self-promoting!

Remember: social media is a party. You must have yummy yummy food and entertainment for people to show up, and stick around. So as you promote your Facebook Page, always keep front and center "what's in it for them?" – what will they get by "liking" your Facebook page, and checking it out on a regular basis?

Assuming your Page has lots of great content that users will like, here are some common ways to promote your Page:

- **Real World to Social.** Don't forget the real world! If you are a museum store, for example, be sure that the cashiers recommend to people that they "like" your Facebook Page? *Why? Because they'll get insider tips, fun do-it-yourself posts, announcements on upcoming museum and museum store events, etc.*
- **Facebook Checkins.** If you are a local business and have entered your local business address into Facebook, this will enable Facebook "check in" on the mobile phone. When a customer walks into your brick-and-mortar store, ask them to "check in" via Facebook. Give them an incentive, such as a weekly drawing for a \$50 gift certificate chosen from among people who have "checked in." When they "check in," Facebook alerts their friends and family, thereby leveraging a current customer to reach new customers. You can even use "check in" at a trade show or real-world event by temporarily making your business address the same as the convention center. To learn more, visit <http://jmlinks.com/37q>.
- **Reviews.** By entering your address into Facebook and enabling the review tab, customers can review your business. Ask customers to review you on Facebook; when they write a review, Facebook may alert their friends and family, thereby leveraging one happy customer to reach other new customers.
- **Cross-Promotion.** Link your website to your Facebook Page, your blog posts to your Facebook Page, your Twitter to your Facebook Page, etc. Notice how big brands like REI do this: one digital property promotes another digital property.
- **Email.** Email your customer list and ask them to "like" your Page. Again, you must have a reason why they'll like it: what's in it for them? Have a contest, give away

something for free, or otherwise motivate them to click from the email to your Page, and then “like” the Page. You can even upload a customer email list and Facebook will use it to “suggest” your Page to matches. See <http://jmlinks.com/37r>.

- **Facebook Internal.** Interact with other Pages, share their content, comment on timely topics using #hashtags, and reach out to complementary Pages to work with you on co-promotion.
- **Use Facebook Plugins.** Facebook has numerous plugins that allow you to “embed” your Facebook Page on your website, and thereby nurture cross promotion. To learn more about plugins, visit <http://jmlinks.com/31a>. If you are using WordPress, you can use the official Facebook plugin at <http://jmlinks.com/31b>. In this way, your blog can promote your Facebook Page, and your Facebook Page can promote your blog. Similarly, your YouTube videos can promote your Facebook Page, and your Facebook Page can promote your YouTube Videos.
- **Leverage your Fans.** People who like your Page are your best promoters. When they first like your Page, when they comment on a post, when they “check in” to your local business on Facebook, and especially when they share your posts, their friends see this. Remember, it’s *social* (!) media, and encouraging your customers to share your content is the name of the game. Create content that your users will pro-actively want to share such as funny memes, contests with give-aways, scholarship opportunities, coupons, useful “how to” articles, etc.
- **Interact with Your Fans and Others.** Your Facebook Page shouldn’t just be one-way. When a fan likes, comments, or shares your post, think about interacting with them in the comments section. It’s *social* media not *solo* media, so be talk with your fans online.

## » ADVERTISE ON FACEBOOK

With the decline of organic reach, many Pages are now **advertising** on Facebook. While many marketers are critical of Facebook’s push towards advertising, I think you have to realize that realistically the Facebook news feed is very, very crowded and that most people really are more interested in the posts of their friends and families than of brands. In this way, you may actually think of your Facebook Page like your website: yes, you want to set it up and make it engaging, but you can’t expect it to promote itself!

Facebook Pages don’t promote themselves.

Facebook Posts don’t reach very many people who like your Page, organically.

So, unless your super fans will do the sharing for you, you’ll need to advertise!

That's the sad and true reality. It's very competitive to show up on Facebook. Enter Facebook advertising, second only to Google on the Internet. You can browse Facebook's official information on how to advertise at <http://jmlinks.com/31c>, but let me walk you through the basic opportunities here.

## Promote Your Page or Other Elements

When you log in as a Page administrator, you'll see a blue button in the left column called "Promote." Click on that. Next, you'll see options:

### How would you like to grow your business?

Creating a promotion helps get you more of the business results you want.

- **Show Your Posts to More People**  
Get more reactions, comments and shares.
- **Set Up an Ongoing Promotion**  
Get up to 47 clicks a month for \$35
- **Get More Messages**  
Connect and chat with potential customers
- **Promote Your Business Locally**  
Connect with people nearby

You can also click the “more” button to see all the options, including “Promote your Page,” which is a way to increase your Page “likes” on Facebook. The available options are:

**Show your posts to more people** – i.e., “boost” your posts to fans of your Page as well as other demographic targets.

**Set up an ongoing promotion** – i.e., promote your website or your business locally.

**Get more messages** – i.e., leverage Facebook messenger to encourage “chats” with customers.

**Promote your business locally** – i.e., showcase your business to a local target audience.

**Promote your page** – i.e., advertise your Page and grow its “likes.”

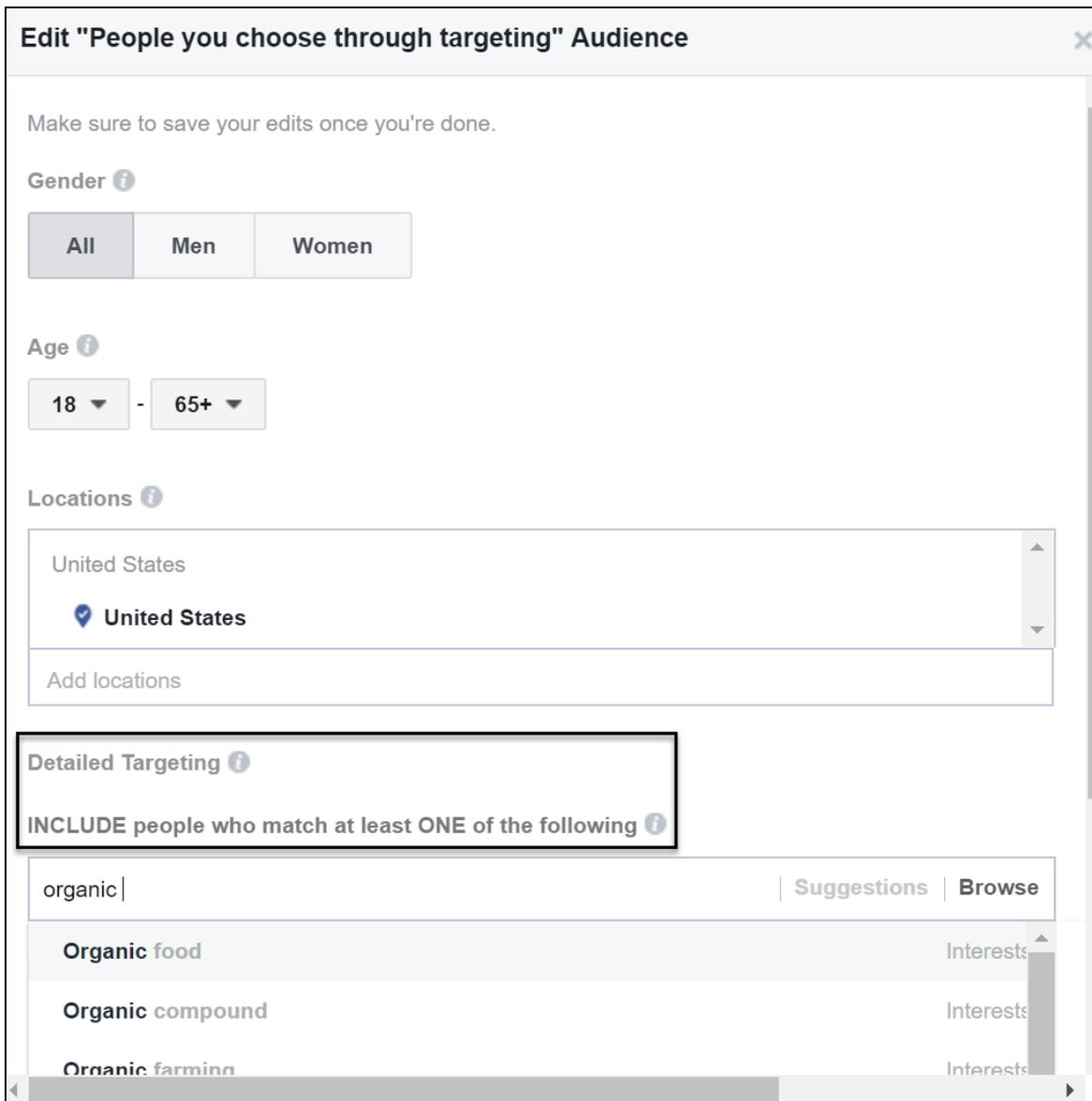
**Get more video views** – i.e., promote a video.

**Get more website visitors** – i.e. advertise a link to an external website.

**Get more customer contacts** – i.e., advertise something “good” and in exchange get customers names, emails, and other contact information.

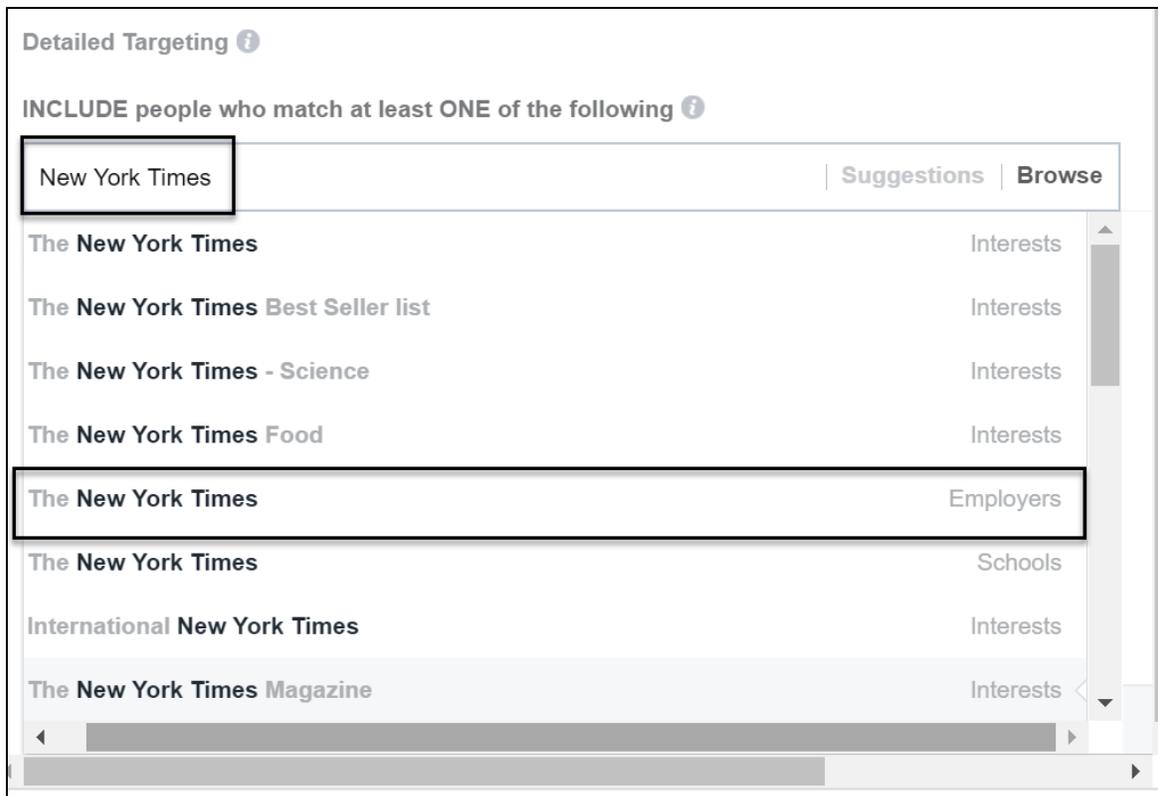
After you’ve chosen one, then you can choose **demographic targeting**. Facebook knows a lot about people, and you can target by geography, gender, age, and interests. You can also target to people who already “like” your Page, essentially “pay to play” – paying Facebook to reach people who have liked your Page already.

Here’s a screenshot showing demographic targeting for the keyword “organic:”



You can even target competitors. If a Page has more than about 5000 likes, it will show in the targeting box. In this way, you can use Facebook to target customers or potential customers who have “liked” a competitors’ Page on Facebook!

And, in an even more granular way, you can even target people who *work* at a particular company. Here’s a screenshot showing how you can target people whose *employer* is the *New York Times*:



The point here is that you can, first, decide *what* you want to advertise (e.g., your Facebook Page, a post, an offlink to your eCommerce website), and second, *decide to whom* you want to advertise in a very, very detailed way demographically. Facebook ad targeting is really unparalleled in the social media universe!

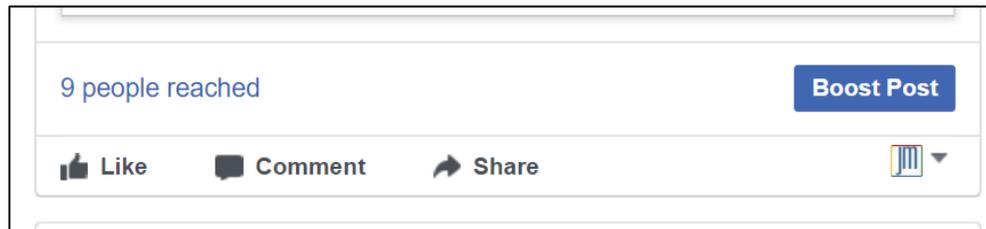
Facebook even has “look alike” audiences in which its algorithm matches your specifications to persons who are “similar.” For example, you can upload your customer email list and Facebook will advertise your Page (post, web link, etc.) to not only those people who match via email but also to a “look alike” audience. See <http://jmlinks.com/37s> for more information. You can also install the *Facebook Pixel* on your website to enable Facebook to match website visitors to Facebook, thus using Facebook remarketing to target ads at folks who have visited your website or your app. Learn more at <http://jmlinks.com/37t>.

## Boost Your Posts

In addition to advertising your Page to get more likes, you can “boost” an individual post. Since many posts by a Page won’t be seen in the news feed, this is a good way to get your posts in front of your target audience. With just a little budget, you can get a lot more

traction, and comparing “time” to “money,” it may be more cost effective to “boost” posts than to work so hard on organic tactics.

Here’s the easiest way to boost a post. First, make the post to Facebook. I recommend that you go all the way through and post it, first, although technically you can boost the post at inception. After your post has been published, immediately find it, and click on the blue “Boost Post” button. Here’s a screenshot:



Once you click on “Boost post,” you get a screen similar to the demographic targets described above on how to promote your Page. Here, however, you can get options such as:

**People you choose through targeting.** For example, a wedding planner in Wichita would choose women 21-35 who are single living in Wichita. You select and identify demographics that make sense.

**People who like your Page.** Here, you are targeting people who “already” like your Page. This is a great strategy not only to make sure that your post is seen in the news feed, but also if you have a post that has a strong likelihood of being shared by your fans, you can “boost” it through advertising and then your fans will further share it to their friends and family. In this way, Facebook advertising works hand in hand with Facebook organic strategies.

**Other audiences.** As you define and save audiences, Facebook makes it easy. You can just select a pre-built audience. Returning to your **buyer personas**, you can name a Facebook audience after a buyer persona, and then advertise, let’s say, a discount on pizza at your Palo Alto restaurant to “Palo Alto Worker Bees,” a customer audience you’ve defined as people within a 10 mile radius of your restaurant with an interest in restaurants, including your competitors.

You then set your **budget, duration, and payment**, and off you go. Note: Facebook does not like images with a lot of text, so if your image has too much text, it will warn you against advertising it. In that case, just select or create an image with little or no text for your boost.

### **Boost Posts to Start Shares**

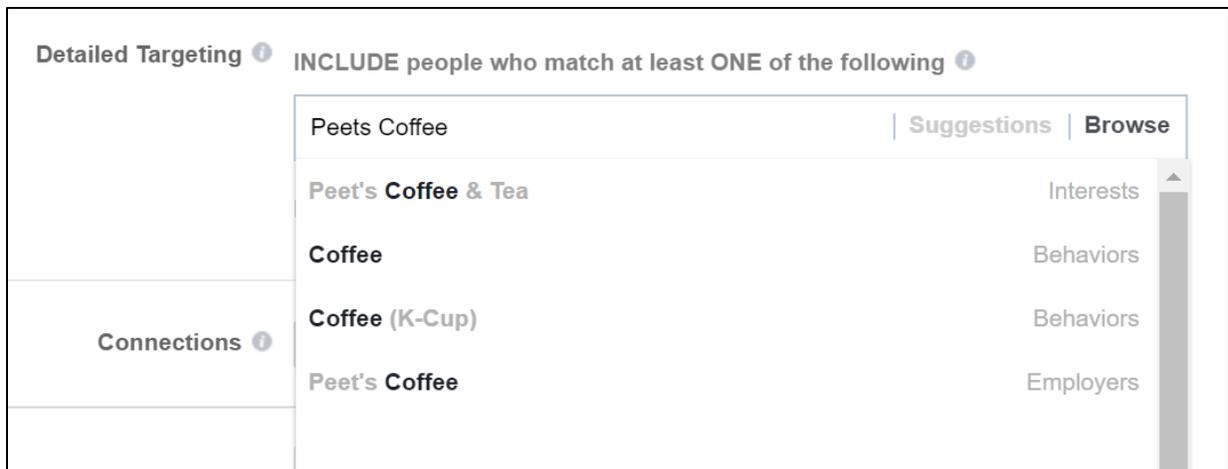
As you boost posts, don't think of Facebook as *organic* OR *advertising* but as *organic AND advertising*. An excellent strategy is to take a post that you know has a high probability of shares and boost it. In this way, your advertising effort can kick start the viral sharing of the post. In fact, most of the posts that “go viral” on Facebook do so by first using advertising to reach key influencers. Advertising, in short, is the match that ignites the sharing ecosystem on Facebook.

### **Target the Fans of Your Competitors**

Your competitors have probably worked hard to get people to “like” their Facebook Page. Well, guess what? Facebook as a hardcore capitalist enterprise is very willing to sell that information to you! You can literally target an ad to promote your Page, your Post, or your Website at directly those people who have “liked” a competitor’s Facebook Page!

To do this, first verify that your competitor has at least 5,000 Page likes, as this only works at levels of about 5,000 or more. For example, let's say we are a new coffee house opening in Palo Alto, California. We'll be serving gourmet, artisan coffee and we want to target “coffee lovers” to find out about our Facebook Page, like us, and of course visit our new coffee house. We realize that Peet's Coffee is a Bay Area chain that has a lot of Facebook activity, with over 700,000 likes at **<http://jmlinks.com/31e>**.

So we go through the steps to advertise our Page, Boost a Post, or advertise our website, and “Save” a custom audience. The first time we do this, we choose Detailed Targeting, and then type in Peets Coffee. Here's a screenshot:



It's a little hard to see in the screenshot, but you'll see that Peet's Coffee & Tea is indicated as an "interest." Next click "Save this Audience" and this "Audience" will be available every time you boost a post, advertise your Page, or advertise your website. You can literally boost any and all posts directly against those people who have "liked" your competitor.

*For example, you could create a post that has an offer of 25% off of any cappuccino or latte, and then "boost" this post to fans of Peet's Coffee who live within 5 miles of Palo Alto. (Begin evil laugh).*

Of course, over time, your competitors can do this to you, too. Facebook is happy to sell this data to any advertiser willing to pony up.

But by targeting the fans of competitors, or being creative (*I sell wedding flowers so I will target people who like the people who "like" the Pages of complementary wedding dress shops, venues, and planners in my locality*), you can really use Facebook advertising to expand your reach and get your social media content out in front of people who are likely to "like" it.

**VIDEO.** Watch a video tutorial on Facebook advertising at <http://jmlinks.com/16m>.

## » MEASURE YOUR RESULTS

Facebook marketing offers pretty good metrics. Inside of Facebook, click on the **Insights** tab at the top of your Facebook Page (when you're logged in, of course). Here you'll find an overview to your Facebook activity, and a post-by-post breakdown of the reach of a post and the engagement. A graph will tell you when your fans are most engaged. You can select "Pages to watch," and keep an eye on your competitors – even down to which posts of theirs were the most interactive.

For any of your posts, click on the post, and a popup window will give you drill-down information. Remember: you are trying to improve *Edgerank*, so pay attention to the positive and negative interactivity. Here's a screenshot of a post of "other people's content" to the JM Internet Group Facebook Page:

Post Details

Reported stats may be delayed from what appears on posts

**232** People Reached

**8** Likes, Comments & Shares

**7** Likes

**7** On Post

**0** On Shares

**0** Comments

**0** On Post

**0** On Shares

**1** Shares

**1** On Post

**0** On Shares

**10** Post Clicks

**0** Photo Views

**8** Link Clicks

**2** Other Clicks

**NEGATIVE FEEDBACK**

**0** Hide Post

**0** Hide All Posts

**0** Report as Spam

**0** Unlike Page

**232** people reached

Boost Post

Like · Comment · Share · **7** · **1**

And here's a screenshot of a post of our own content that was boosted for \$200.00

Post Details Reported stats may be delayed from what appears on posts X



**JM Internet Group**  
Published by Hootsuite [?] · June 23 at 7:20am · 🌐

Email marketing: the Rodney Dangerfield of social media. Here are our top ten free tools for email marketing. <https://www.jm-seo.org/?p=2273>



**Email Marketing Tips & Tools - the Top Ten Tools for Email Marketing**

~...  
Email marketing is the 'Rodney Dangerfield' of social media: it don't get no respect. However, it can be...

WWW.JM-SEO.ORG

7,800 people reached View Results

Like · Comment · Share · 👍 469 💬 1 ➦ 15

<b>7,800</b> People Reached		
<b>494</b> Likes, Comments & Shares		
<b>477</b> Likes	<b>469</b> On Post	<b>8</b> On Shares
<b>2</b> Comments	<b>1</b> On Post	<b>1</b> On Shares
<b>15</b> Shares	<b>15</b> On Post	<b>0</b> On Shares
<b>69</b> Post Clicks		
<b>0</b> Photo Views	<b>47</b> Link Clicks	<b>22</b> Other Clicks ⓘ
<b>NEGATIVE FEEDBACK</b>		
<b>2</b> Hide Post	<b>0</b> Hide All Posts	
<b>0</b> Report as Spam	<b>0</b> Unlike Page	

Pay attention to the *reach*, *likes*, *comments*, *shares*, and *clicks* of all your posts (both organic and advertised). All of this is influencing *Edgerank*. The *more interactive* your Page and posts are, the *higher* your Edgerank, and the *higher* your Edgerank the *more* people will see your posts and Page.

**Interactivity** is where it's "at" on Facebook!

Back to the top tabs, you can also drill down into people, to see the demographics of who is interacting with your Page. All in all, Facebook provides excellent insights into who is interacting with your Page. Use this information to make your Page better and better!

## Google Analytics

For many of us, we want to drive traffic from Facebook to our website, even to our ecommerce store or to download a free eBook or software package to get a sales lead. Sign up for Google Analytics (<https://www.google.com/analytics>) and install the required tracking code. Inside of your Google Analytics account on the left column, drill

down by clicking on *Acquisition > Social > Overview*. Then on the right hand side of the screen you'll see a list of Social Networks. Find Facebook on that list, and click on that. Google Analytics will tell you what URLs people clicked to from Facebook to your Website, giving you insights into what types of web content people find attractive.

You can also create a custom **segment** to look at only Facebook traffic and its behavior. For information on how to create custom segments in Google Analytics, go to <http://jmlinks.com/1f>. For the Google help files on segments go to <http://jmlinks.com/1g>.

In sum, inside of Facebook you can see how people interact with your Page and posts. Inside of Google Analytics, you can see where they land on your website and what they do after they arrive.

**VIDEO.** Watch a video tutorial on how to use Google Analytics to track clicks from social media sites like Facebook to your website at <http://jmlinks.com/16n>.

## »»» CHECKLIST: FACEBOOK ACTION ITEMS

Test your knowledge of Facebook! Take the *Facebook marketing quiz* at <http://jmlinks.com/qzfb>. Next, here are your Facebook **Action Items**:

- Research** Facebook to find out whether your customers are on it and what they are doing.
  - Identify** both **competitors** and **companies to emulate**; “reverse engineer” their Page set up and posting strategies.
  - Investigate** which types of **posts** are getting the most **interaction** from fans and why.
- Set up and Optimize your Facebook Page.** Identify profile and cover photo art. Select the appropriate tabs, including whether to enable the “review” tab or not and whether to allow posts to the Page by fans.
- Brainstorm a Posting Strategy.** Begin to systematically create blog posts, photos, videos, etc., that match your marketing strategy to the interests of your target fans. Seek to encourage likes, comments, and shares.

❑ **Promote your Facebook page** via the real world, cross-promotion among Internet properties, and via advertising on Facebook.

❑ **Measure your Facebook results** using KPIs such as growth of Page likes, volume of interactivity of individual posts (e.g., likes, comments, and shares), and whether Facebook is generating traffic to your website, i.e., sales or sales leads.

Check out the **free tools!** Go to my *Social Media Marketing Dashboard > Facebook* for my favorite free tools on Facebook. Just visit <http://jmlinks.com/smmdash>.

### »» **DELIVERABLE: A FACEBOOK MARKETING PLAN**

We've come to the end of our chapter on Facebook, and your **DELIVERABLE** has arrived. For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code '2018social' to register if you have not already done so), and click on the link to the "Facebook Marketing Plan." By filling out this plan, you and your team will establish a vision of what you want to achieve via Facebook.



# 4

## LINKEDIN

If **Facebook** is all about *friends, family, and fun* – a kind of 24/7 *company picnic*, **LinkedIn** is all about *business networking* – a kind of 24/7 *online corporate party*. Indeed, if you’ve ever been to a big trade show such as the *Consumer Electronics Show* in Las Vegas, you’ve likely attended corporate *meet-and-greets, wine and cheese events, or breakout learning sessions* on important industry topics. These industry conference “parties” feature free food and entertainment, a speech or two by the CEO, and lots of *business networking* between vendors and potential customers. Dressed in business casual, people listen attentively, are in “learning” mode, and are also ready to introduce themselves and their products to you and others.

**Business networking**, in short, is the No. 1 activity via LinkedIn marketing!

Accordingly, this chapter will explore **how to market a business on LinkedIn**, specifically the four big marketing opportunities on the network: 1) setting up your **profile** (as well as those of your employees) as a **public resume**, 2) using LinkedIn to **network** with customers and prospects, 3) participating in LinkedIn **groups**, and 4) leveraging a **company page** for your business.

**Let’s get started!**

### TODO LIST:

- » Explore How LinkedIn Works
- » The LinkedIn Profile as Public Resume
- » Schmooze on LinkedIn: Your Social Rolodex
- » Be Active on LinkedIn: Posts, *Pulse*, and Groups
- » Use LinkedIn Company Pages

» Promote Your LinkedIn Profile, Posts, and Pages

» Advertise on LinkedIn

» Measure your Results

»» Checklist: LinkedIn Action Items

»» Deliverable: A LinkedIn Marketing Plan

## » EXPLORE HOW LINKEDIN WORKS

Let's review the basic structure of LinkedIn:

- **Individuals have LinkedIn profiles**, which function as online resumes listing skills, education, and interests. Profiles allow one individual to “connect” with another individual; once connected, any post by individual No. 1 will show in the news feed of individual No. 2. In this sense, LinkedIn profiles function structurally in exactly the same way as Facebook profiles: you send *connection requests* (the same as *friend requests* on Facebook), and once accepted and connected, you and the other individual can directly check each other out, communicate via LinkedIn messaging, and see posts to each other's news feed.
- **Individuals can join groups**. While groups on Facebook are of limited business interest, groups on LinkedIn are very important. As at a major trade show, LinkedIn has “break out” groups by topic (from petroleum engineering to marketing to advertising to WordPress web design and beyond), that bring like-minded people together in a professional way. Note, however, that it is *people* (and not business *Pages!*) that participate in groups.
- **Companies can have LinkedIn Pages**. As on Facebook, companies can create business Pages on LinkedIn. Individuals can follow companies, and by doing so, give permission to that company to converse. Posts by the company have a chance to show in the news feed of individuals who have “followed” a particular company. Company Pages can also advertise on LinkedIn.
- **Posts and the News Feed**. When an individual shares a post or article to his or her LinkedIn profile, or a company shares a post to its LinkedIn Page, those posts show up in the news feed of connected individuals. LinkedIn, like Facebook, therefore has a posting rhythm in which individuals and businesses compete for eyeballs and attention.

Structurally, therefore, LinkedIn is very similar to Facebook. *Profiles and connection requests, Pages and following, posts and news feeds.*

### **A More Serious Culture**

However, the **structural** similarities hide a very different **culture** on LinkedIn. Whereas on Facebook, the center of marketing is the business *Page*. On LinkedIn, the center of gravity lies with the personal *profiles* of employees. Whereas on Facebook, you primarily interact with business Pages in terms of marketing, on LinkedIn you primarily interact with the *employees* of various businesses. And, of course, the personality of LinkedIn is far more serious and business-like than Facebook. People are in “learning” and “business mode,” sharing information and posts about business trends and topics, not the latest cat video or SNL skit.

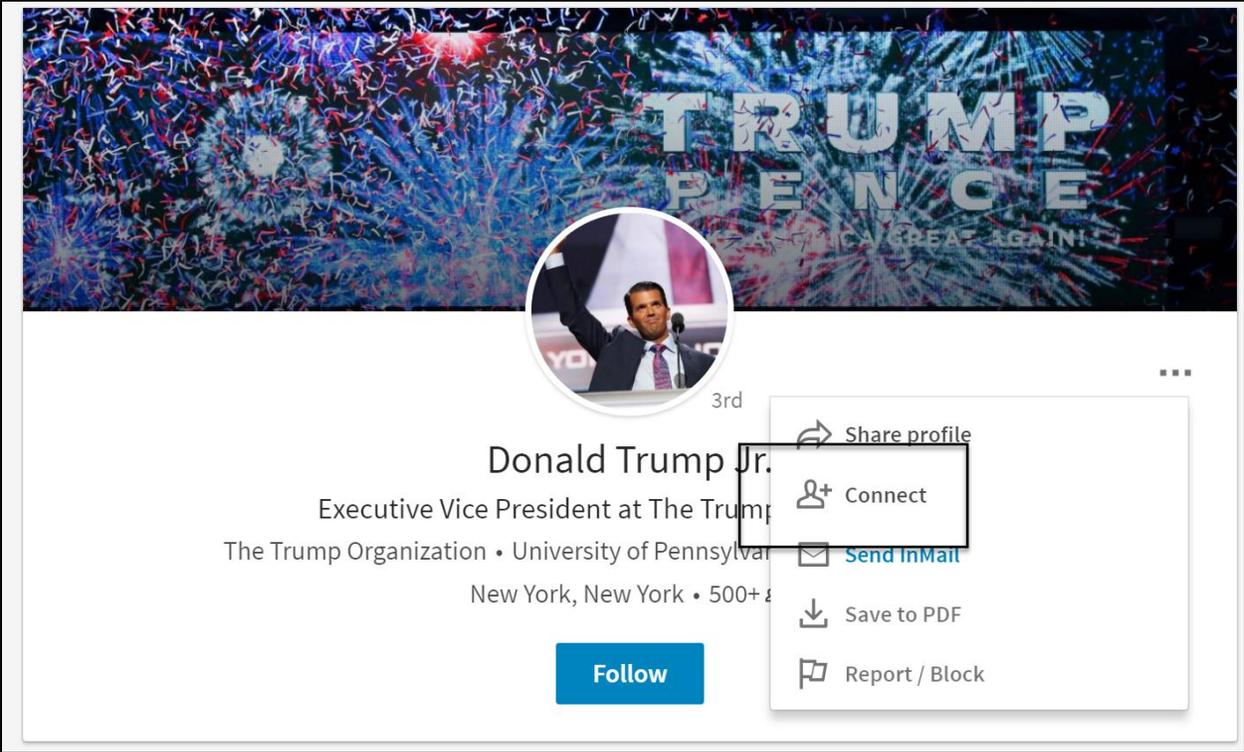
## LINKEDIN'S CENTER OF GRAVITY IS THE PERSONAL PROFILE

LinkedIn's center of gravity is *person-to-person interaction*. This makes sense if you compare a company picnic (Facebook) with a business networking event (LinkedIn). Whereas at the former, you interact with the company (who brings the food and entertainment, and pays for the party), at the latter, you interact with the employees of the company, talking about industry events and schmoozing about shared interests. You don't business network with *companies*, after all. You business network with *individuals*.

### **Don't Talk to Strangers?**

Whereas on Facebook most of us are suspicious of friend requests from people we don't know, or only barely know, on LinkedIn it is much more common to send a connection request “out of the blue” or to a person you just met. Ironically, talking to strangers is more difficult on Facebook than it is on LinkedIn. And, whereas on Facebook, it's impolite to ask what one “does for a living” or to “pitch business ideas,” on LinkedIn this is so important as to be the core function. With even the most tangential of connections, on

LinkedIn you can easily reach out and ask for a connection. For example, here's a screenshot of me reaching out to Donald J. Trump, Jr.:



By clicking “connect,” I can ask to be his “LinkedIn friend,” as it were. People on LinkedIn, in short, are in **business networking mode** and it’s OK to connect to near strangers, and talk about and talk up your business, up to and including sales pitches (within polite reason). This makes it a fantastic social medium for business-to-business marketing!

## LINKEDIN IS THE 24/7 BUSINESS NETWORKING EVENT

In addition, LinkedIn groups are rather robust, especially in technical areas. For a technical industry such as oil and gas, people increasingly use LinkedIn groups as a way

to stay professionally educated. LinkedIn's acquisition of Lynda.com (<https://www.lynda.com/>) speaks to this growing trend to use LinkedIn as a way to stay up-to-date about an industry. Finally, although business Pages do exist on LinkedIn and are increasingly important for business-to-business companies, their utility is much weaker than on Facebook for business-to-consumer companies.

## **LinkedIn is a Team Sport**

Perhaps the most important distinction of all is to think of Facebook as a *company-first* marketing platform and LinkedIn as an *employee team-first* marketing platform. Whereas on Facebook, you can manage your marketing “top down,” using your company Page as your primary customer interaction vehicle, on LinkedIn you must rely heavily on your employees. Every customer-facing employee needs to be “on board” with your LinkedIn marketing: he or she needs a robust LinkedIn profile, and a passionate commitment to schmooze with other LinkedIn members through outreach, posting, and group participation. To really succeed at LinkedIn as a business, each and every customer-facing employee must actively participate as an individual, and your company should manage its own LinkedIn business page in tandem. LinkedIn, in sum, is an **employee team sport** (more on this later).

***Employee participation** + an active **LinkedIn business page** = LinkedIn marketing **success**.*

In fact, LinkedIn even has a paid service called “Elevate,” that enables employee co-promotion with your business at <http://jmlinks.com/31f>.

## **You = You and Your Employees on LinkedIn**

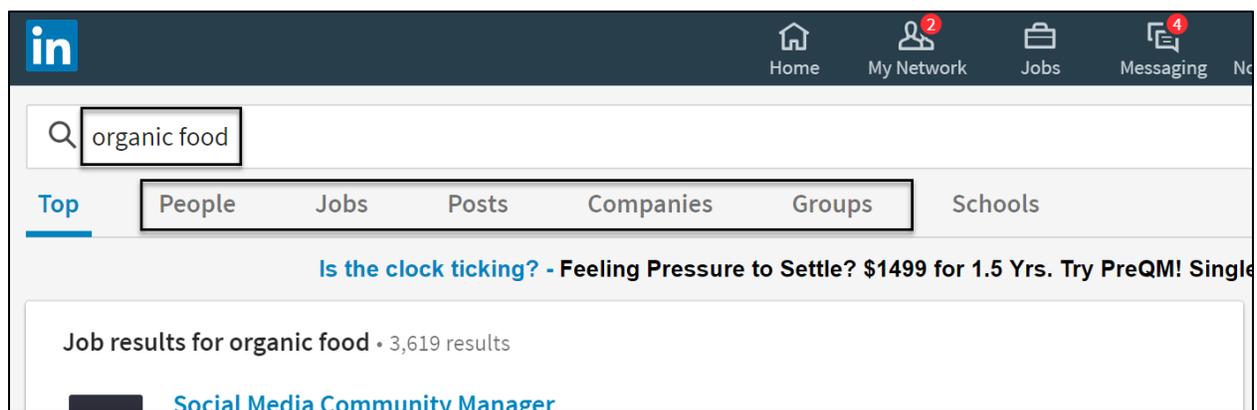
Throughout this Chapter, I will often refer to an individual “you” as participating in LinkedIn, but remember when I say “you,” I mean “you” as an individual as well as “you” as a team of like-minded, enthusiastic employees. If your company is one employee, five employees, or five hundred employees, the real key to LinkedIn success is to get everyone “on board” and participating! Go team!

## **Search LinkedIn**

First, you'll need to research LinkedIn to estimate its value to your business marketing efforts. (We'll assume you've already set up a basic personal profile on LinkedIn. If not, visit <https://www.linkedin.com/> and sign up). For your first **TODO**, log on to LinkedIn, and search by keywords that are relevant to your company or industry. Identify persons, groups, and companies that are active on these topics.

Simply type a keyword of interest into the search bar at the top of the LinkedIn page (e.g., "organic food" if your company is involved in the organic industry, or "oil and gas," if your company works in the petroleum industry). On the top, click on people, jobs, companies, groups, universities, or posts, to narrow down your search and browse by entity.

Here's a screenshot:



To search for posts on "organic food," for example, you'd click "Posts." To search for companies, you'd click "Companies," etc.

As you begin touring LinkedIn with the question of whether (or not) your potential customers actively use it, narrow your search by type, and ask these questions:

**People.** Do you see many people who are your target customers with active profiles on LinkedIn? You're not looking to hire them; you're looking to see if your target customers are engaged enough on LinkedIn to be actively updating their profiles, posting to their accounts, and reading their news feeds. Are your customers active on LinkedIn?

**Posts.** Who is posting on relevant topics on LinkedIn and why? What is the quality of the posts, and are there many comments, and reshares to specific posts? Who's

posting and what are they saying? What topics are posted, and get the most interaction?

**Companies.** Especially for business-to-business sectors, LinkedIn company pages can be quite robust. Are your competitors on LinkedIn? Are similar companies? If so, what are they doing? If not, why not? Do you see a lot (or a little) interaction on the company pages?

**Groups.** LinkedIn groups act like breakout sessions at a trade show. Do you see relevant groups on LinkedIn? Are they active with many members, or dormant with just a few? What kinds of discussions are going on?

As is always the case in social media, there's no point in pouring time, treasure, and talent into LinkedIn marketing if you don't see your customers online. But if you do, then it will be well worth the effort.

For your first **TODO**, download the **LinkedIn Research Worksheet**. For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code '2018social' to register if you have not already done so), and click on the link to the "LinkedIn Research Worksheet." You'll answer questions as to whether your potential customers are on LinkedIn, identify individuals and companies to follow, and inventory what you like and dislike about their LinkedIn set up and marketing strategy.

## » THE LINKEDIN PROFILE AS PUBLIC RESUME

The personal profile is the foundation of LinkedIn. Just as on Facebook, an individual needs to set up a LinkedIn profile and populate it with information about him or herself. Unlike on Facebook, however, this personal profile is highly visible and acts as a kind of "public resume." As a business owner or marketer, you'll want your own well-optimized profile, but you'll also want to motivate your CEO, other key executives, and any employees that are customer-facing to also set up and optimize their LinkedIn profiles.

The **TODOS** here are:

1. **Sign up** for LinkedIn as a personal profile (and encourage everyone else in the company to sign up as well!)
2. Identify the **keywords** that represent your business value to other people, that is keywords that "describe you" as a businessperson and/or a company or non-profit,

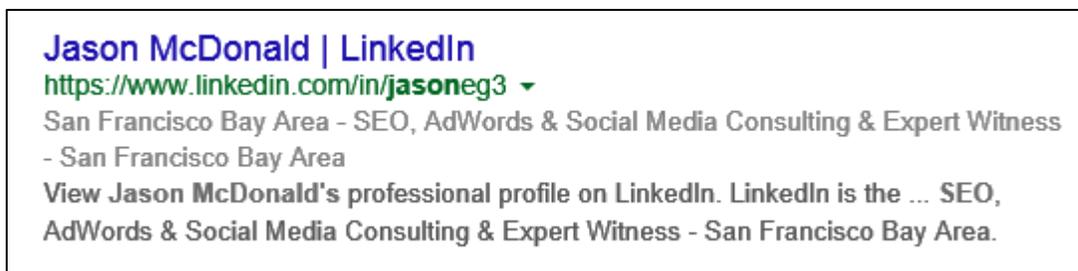
such as “WordPress web designer,” “CPA,” or “Business Coach for startups,” or “Apple iPhone App development firm.”

3. **Optimize** your personal profile so that it –
  - a. Clearly and quickly represents your **personal business value proposition** as well as that of your **company**.
  - b. Is **findable** via LinkedIn search by **keywords**.
  - c. Establishes **trust** in you and your company as an authority and someone who is worthy of a business partnership.

First and foremost, think of **search** and **trust**. By search, we mean that people will go to Google and/or LinkedIn after they have met you or a key employee. They’ll *search* you on the Internet with an eye to deciding whether you have any skeletons in your closet, whether you seem knowledgeable about your subject, and whether you seem like a good person to do business with. This trust will *flow up* to the company as well. Nowadays, people go to networking events such as trade shows, and return with business cards and email addresses. They then *vet* these people and their companies by searching them on Google and on LinkedIn. Indeed, you can optimize your LinkedIn profile to show high on searches for your own name plus keywords.

Think of your LinkedIn **profile** as your **public resume**. Think of your employees’ profiles’ as their **business cards** to exchange at an industry trade show.

To see mine, visit <http://jmlinks.com/3g>. Note that my LinkedIn profile appears in about position four on a Google search for *Jason McDonald SEO*. Here’s a screenshot:



The concept here is when someone meets me (*or meets you, or meets a key employee*), you want to use LinkedIn to show prominently in a search for your name plus keywords,

plus you want your LinkedIn profile to show off your expertise and talents. Just like a real (paper) resume, your LinkedIn resume (profile) should be optimized to be found and to put your best foot forward. It should also be publicly viewable without the necessity of being logged into LinkedIn.

**Think your name plus keywords.** For example, there are 33,000,000 results on Google for *Jason McDonald*. So people would search not just for *Jason McDonald* but for *Jason McDonald* plus keywords to check me out. *Jason McDonald SEO*, *Jason McDonald Social Media*, or *Jason McDonald AdWords*. Do likewise for yourself and key employees. What keywords best describe your utility to customers? Are you *Aileen Smith the Accountant*, *Jake Harris the Javascript Programmer*, or *Jeevan Lakshmi the Environmental Architect*?

## **Optimize Everyone's LinkedIn Profiles**

Having optimized your own profile, now it's time to call a "group meeting" of your employee team. Have them each optimize their LinkedIn profiles vis-à-vis your target keywords and target customers. It is essential that **all** key, customer-facing employees optimize their LinkedIn profiles.

**Remember:** *LinkedIn is a team sport: you need every employee "on board" with full and eager participation! If they're ho-hum about this, explain that this new, optimized profile will be very useful to them after they get fired for lack of enthusiasm, and they're out looking for a job! (Just kidding – now smile for your new profile picture).*

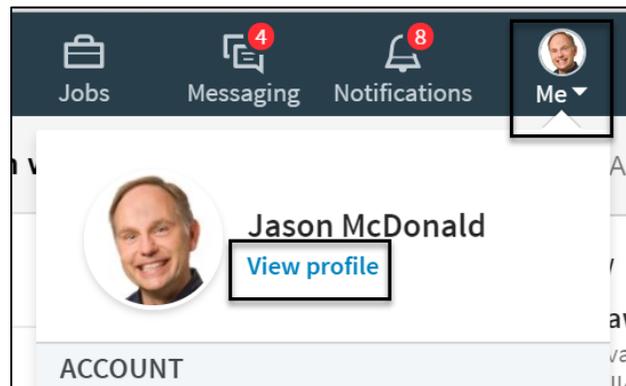
As you work with key employees, let's turn to the steps to **optimize** a LinkedIn profile for search and trust.

**Define your target keywords.** What value do you provide for others in a business relationship? Remember: you are NOT looking for a job. Generally, you are positioning yourself as a "helpful expert" in a defined area. Are you a WordPress expert? An expert CPA for small business? An architect with a focus on ecofriendly design? Brainstorm and define the logical keywords that someone would append to your name. There are, for example, many "Jason McDonalds" in

this world. But I want to rank, and be trusted as the Jason McDonald that can help you with **SEO**, **Social Media**, and **AdWords**. Thus, I embed those keywords in my profile, and write it well enough to convey my value as a helpful expert in those endeavors.

**Once you have identified your keywords, weave them strategically into your LinkedIn profile starting with the LinkedIn professional headline.**

To access these features, click on *profile > Me* (Underneath your profile picture on the top navigation) while logged in to LinkedIn. Then click on *View Profile*. Here's a screenshot:



Hover over an area, and click on the pencil to edit.

**Headline.** This is the most important text on your LinkedIn profile for search discoverability. It should answer the question, “What can you do for me?” Here's a screenshot of mine:

Edit intro ✕

Profile photo



First Name \*

Last Name \*

[Add former name](#)

Headline \*

**Current (Position).** This is your current job, so state it well.

**Education.** List your education, most recent first.

**Country, Zip Code, Locations within this area, and Industry.** Fill out as appropriate.

**Summary.** Like a real resume, this describes your skills and experience. *Do NOT write this like you are looking for a job, if you are NOT looking for a job!* Instead, use ALL CAPS and other ways to break up the content. Populate it with relevant keywords that people might search on LinkedIn, and make it easy to read. It should state your business value proposition succinctly. Write this “as if” you were explaining to someone at a business networking event what you do, and how this is relevant for what they might need.

**Media.** Add links to external documents, including SlideShares or YouTube videos.

*(You may have to click the “more” button to get below to the next information).*

**Experience.** Here's where you input your current and past employment. If your company is on LinkedIn with a company page (and, of course, it should be), a logo will be available. Again, write succinct summaries of current and past employment that contain logical keywords (do not overdo this), and explain how you can help an interested party to accomplish something of business value.

**Accomplishments.** Input any languages you speak as well as certifications.

**Education.** Don't be shy. Populate your education section with your educational achievements, not only degrees but any awards or extra-curricular activities.

**Interests.** LinkedIn will populate this with companies and groups you follow. So find some, and follow them.

**Add New Profile Section.** If you like, you can beef up your profile even further by adding publications, skills, honors, patents, etc. This is located on the top right in blue.

**VIDEO.** Watch a video tutorial on how to optimize your LinkedIn Profile (as well as that of key employees) at <http://jmlinks.com/16r>.

## A Word about Groups

At this point, we are optimizing your LinkedIn profile for **search** and **trust**. In terms of groups, therefore, you might consider joining groups not because you plan to actively participate in them but because they convey your interests and skills. For example, I am a member of both the Harvard and UC Berkeley alumni associations really just to convey that I am smart, and attended these prestigious institutions. Similarly, I am a member of Ad Age and WordPress experts groups to convey my interest and expertise in those topics. (I don't actually participate in these groups in any serious way – I'm too busy!) Think of groups as you would think of college extracurricular activities on your resume: to convey interests and skill.

## Contact and Personal Info

At this point, scroll back up, to the top right column and look for “Contact and Personal Info.” Click on the pencil icon. That will open up your “contact info” options. Here’s a screenshot:

### Edit contact info ✕

Profile URL  
[linkedin.com/in/jasoneg3](https://www.linkedin.com/in/jasoneg3) ↗

Website URL  
  ▼

Type (Other)  
 [Remove website](#)

Website URL  
  ▼

Type (Other)  
 [Remove website](#)

Website URL  
  ▼

Type (Other)  
 [Remove website](#)

Phone  
  ▼

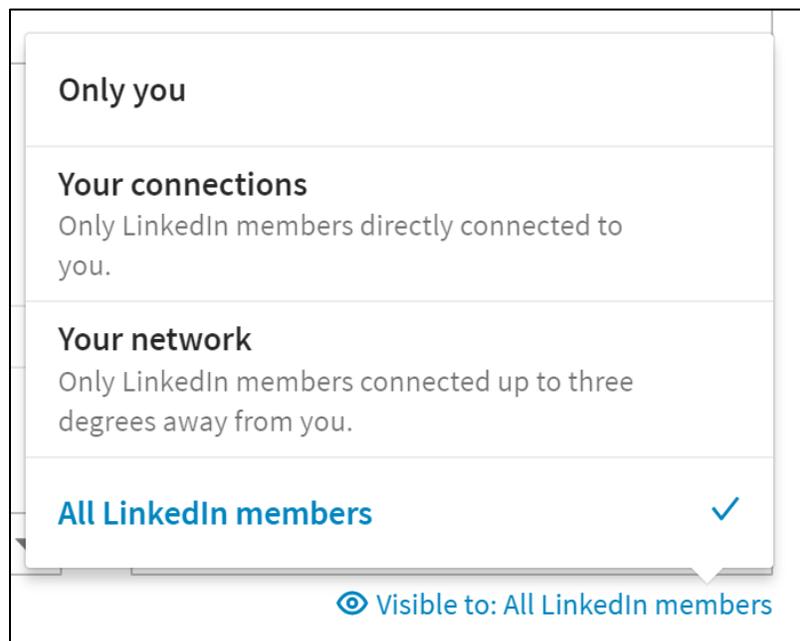
Here, the Profile URL becomes your public URL (viewable on the Internet, including Google and Bing). You can then enter your website URL (or blog URL), as well as other information. If you select “other” you can name them, as I have such as “Contact Jason,” “Read Jason’s Blog,” or “View My Portfolio,” which then link directly to external websites. You can also enter your work phone number here.

*If you want to be highly findable and easy-to-reach via LinkedIn, be sure to enable the Websites section under your contact information. These are visible to everyone not just your 1<sup>st</sup> level connections.*

**Note:** I do not recommend you enter your physical address on LinkedIn. There are too many stalkers on the Internet, so I recommend leaving this blank.

But do enter your email address, Twitter, and birthday. Mine is January 14<sup>th</sup>, and I have entered it into LinkedIn. This means that every January 14<sup>th</sup> LinkedIn (and Facebook) alert my friends and connections that it is my birthday. In this way, I get tons of fake accolades each January and don’t feel so pathetically alone. So I do recommend entering your birthday! (*Message me via LinkedIn on January 14<sup>th</sup> if you’d like to send me a very special gift*).

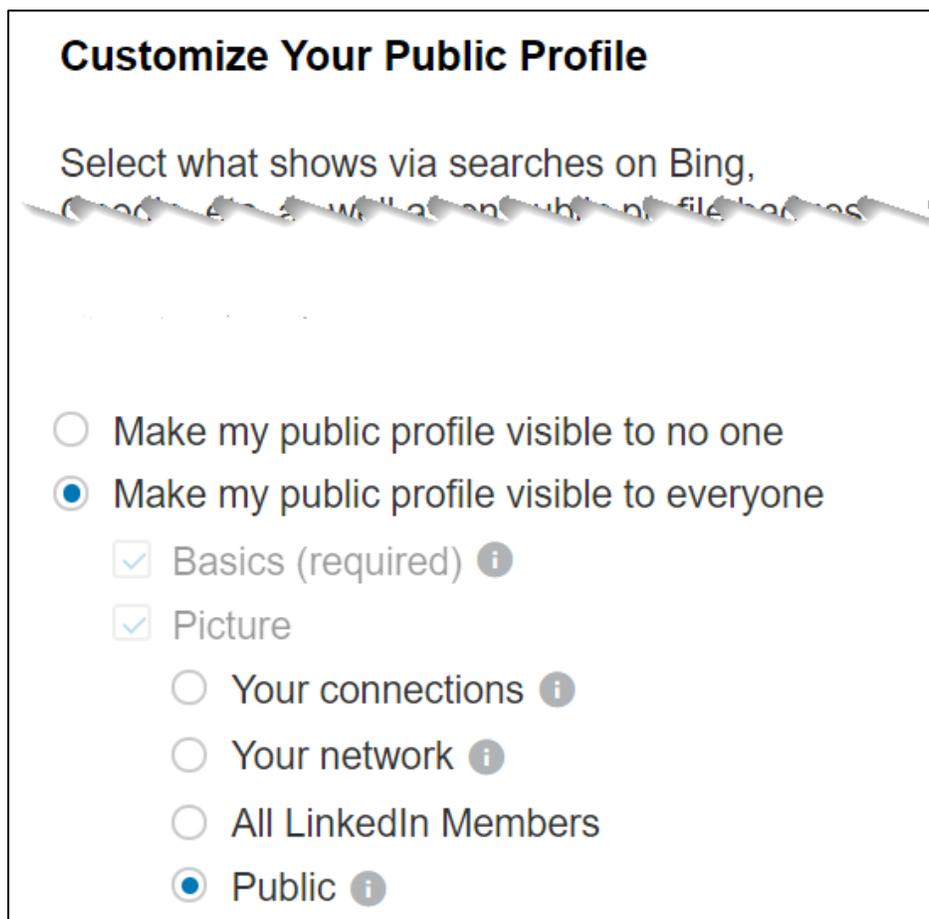
Next, select how visible you want your birthday to be. Here’s a screenshot:



Depending on how offended you are by unsolicited birthday wishes and spam, you can select “only you,” “your connections,” “your network,” or “all LinkedIn members.” The default would be “your connections” (Generally, only 1<sup>st</sup> level connections can view your important contact information like email or phone number).

## **Edit Your Public Profile**

Click up to the top right and find “Edit public profile and URL.” Here’s where you can adjust how easy it is for strangers to see your information. Remember: unlike on Facebook, we generally want strangers to be able to find us and learn about us on LinkedIn. This is especially true for customer-facing staff, such as your sales staff or technical support personnel. On the right side of this new pop up window, scroll down to “Customize Your Public Profile.” By checking / unchecking the boxes you can select what outsiders can easily see about you. Here’s a screenshot:



Mine is set to **Public**, meaning outsiders can see my information. But note only 1<sup>st</sup> degree connections can see your contact information such as your email address or phone number. Note also at the top right above Customize Your Public Profile is your public profile URL. This is what will appear on Google to the entire world. Mine is <https://www.linkedin.com/in/jasoneg3/>, for example.

If you click on “Your public profile badge,” LinkedIn will give you the HTML code so that you can put a direct link on your personal blog, company website, etc., to your LinkedIn profile. This is great for cross-fertilization, and to establish yourself as a “helpful expert” on other venues.

**A word about privacy.** For most of us, we want to be highly **visible** (*non-private*) on LinkedIn. We want potential customers, friends, and business associates to easily find us. Therefore, set your public profile as “visible to everyone,” and check all of the boxes below. *If, for some reason, you do NOT want to be publicly visible on LinkedIn, then set the visibility and check boxes accordingly.*

One of the more common mistakes people make is to think of the LinkedIn profile like the Facebook profile: whereas on Facebook, you often want to be *invisible / private* to strangers, on LinkedIn you often want to be *visible / public* to strangers. Accordingly, setting your LinkedIn to *private* defeats the purposes of search and trust as part of your LinkedIn marketing.

For most people, therefore, I recommend that they set LinkedIn to fully *visible / public*.

## GENERALLY, LINKEDIN IS *PUBLIC* PROFILE & *PUBLIC* COMPANY, WHILE FACEBOOK IS *PRIVATE* PROFILE & *PUBLIC* COMPANY

At that point, you’re done with populating and optimizing your LinkedIn profile for **search** and **trust**. Congratulate yourself: you’ve optimized your LinkedIn public resume!

For your second **TODO**, download the **LinkedIn Profile Worksheet**. For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code ‘**2018social**’ to register if you have not already done so), and click on the link to the “LinkedIn Profile Worksheet.” You’ll answer questions to help you set up and optimize your LinkedIn Profile.

**Note:** as we will discuss below, if you have several “outward-facing” employees, it’s an excellent idea to sit down as a company group and have a LinkedIn optimization workshop. Have each and every important employee optimize his or her LinkedIn profile.

## **Recommendations and Endorsements**

While building out your profile, you’ll notice that some people have many **recommendations** or **endorsements**. **Recommendations**, like references for a resume, are generally all positive. After all, you control them: why ask for a reference from a boss or coworker who won’t give you a glowing endorsement? Similarly, LinkedIn will prompt you (and your connections) to complete **endorsements** for each other concerning relevant skills. These build out like “merit badges” on your profile, making you look trustworthy.

*Note: you control whether recommendations show on your public profile; you can suppress any you do not like.*

## **Solicit Recommendations and Endorsements**

Your **TODO** here is to ask for recommendations and endorsements from friends, coworkers, and business colleagues. One of the best ways to get them is to pro-actively do them for other people. After completing a project with an outside vendor, for example, connect to that person on LinkedIn and write him or her a glowing recommendation and endorsement. Often, they will reciprocate. (*This is called “pre-emptive” recommendations in LinkedIn lingo.*) Regardless of how you get them, getting many positive recommendations and endorsements will make your LinkedIn profile shine.

## **» SCHMOOZING ON LINKEDIN: YOUR SOCIAL ROLODEX**

Nearly everyone needs an optimized personal profile on LinkedIn, if for no other purpose than job search. For those whose job is “client or customer facing,” meaning identifying, interacting, and schmoozing with potential clients, the primary purpose of LinkedIn is to *schmooze*. (Schmoozing, of course, is another word for business networking: expanding your circle of business contacts, nurturing their respect for you, and keeping top of mind so that when they have a business opportunity, they think of you).

By nurturing your 1<sup>st</sup> level contacts and being active on LinkedIn, you can use LinkedIn as your online social rolodex, extending beyond just people you actually know to people

you'd like to know for your business needs. Let's investigate schmoozing on LinkedIn, namely:

**1<sup>st</sup> level contacts:** these are people who have accepted your connection requests on LinkedIn.

**2<sup>nd</sup> level contacts:** these are 1<sup>st</sup> level contacts of your 1<sup>st</sup> level contacts (*friends of friends*, as it were).

### **LinkedIn Connections: What's Your Bacon Number?**

Your "bacon number" is a term coined to humorously point out that nearly everyone on the planet is connected to actor Kevin Bacon. Google, for example, has a funny hidden Easter egg: go to Google and type in a famous person's name followed by "bacon number," for example: "Cher Bacon Number" or visit <http://jmlinks.com/12u>. Cher has a Bacon number of two because she and Jack Nicholson appeared in *The Witches of Eastwick*, and Jack Nicholson and Kevin Bacon appeared in *A Few Good Men*.

So Cher is a 1<sup>st</sup> level connection with Jack Nicholson, and a 2<sup>nd</sup> level connection with Kevin Bacon. (*Which means that my Bacon Number is a four, because my Mom knows Cher, Cher knows Jack Nicholson, and Jack Nicholson knows Kevin Bacon*).

How does the Bacon number concept relate to LinkedIn? LinkedIn uses the same system universally: you can *direct message* or *see the email* of your 1<sup>st</sup> level connections, and you can use your 1<sup>st</sup> level connections to get introduced to your 2<sup>nd</sup> level, for example:

Cher can message via LinkedIn or email Jack Nicholson, directly. (1<sup>st</sup> level).

Cher can "see" that Jack Nicholson is connected to Kevin Bacon, and ask Jack to "introduce" her to Kevin. (2<sup>nd</sup> level).

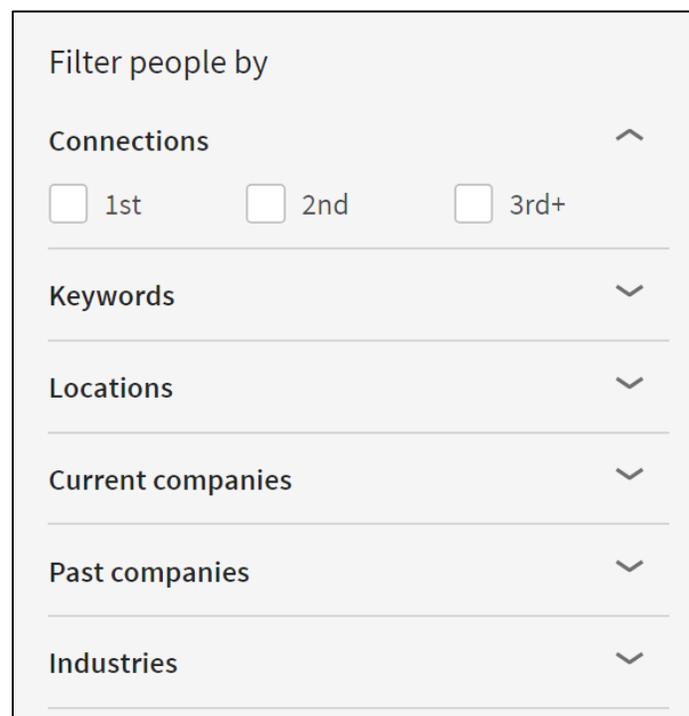
Similarly, on LinkedIn, you can directly message / find the email of anyone who is your 1<sup>st</sup> level connection. Or, you can ask a 1<sup>st</sup> level connection to introduce you to a 2<sup>nd</sup> level connection. (Note: this can now only be done via the mobile phone). For example, simply search on LinkedIn for the name of someone with whom you are already connected. Then:

Click on the **blue** “Send a message” box. This sends them a message via LinkedIn, and in most cases, will also send them an email alert that they have a message waiting on LinkedIn.

or –

Click on the “**Contact info**” tab and you can view their email address, phone number, and address.

Or, let’s assume you’re trying to find a connection that has a particular interest or skill. Rather than typing a person’s name into the search box, type a keyword / keyphrase such as “WordPress,” or “Joomla,” or “Accountant for small business” and hit search. Across the top, click on “People.” Then on the far right, you can filter by 1<sup>st</sup>, 2<sup>nd</sup>, or 3<sup>rd</sup> level connection plus additional keywords. Here’s a screenshot:



If, for example, you click on “People,” you are only searching LinkedIn for people whose profiles contain that keyword. If you click on “People,” and on “1<sup>st</sup> Connections,” then you are searching for people whose profiles contain the keyword AND are in a 1<sup>st</sup> level connection with you. Remember: 1<sup>st</sup> level connections mean you can direct message them via LinkedIn and/or see their email address and other contact information.

Essentially, you are able to use LinkedIn as a searchable rolodex of 1<sup>st</sup> and 2<sup>nd</sup> level business contacts: define what type of person you want to contact (or prospect), search for them, and reach out directly. For those who are 1<sup>st</sup> level connections, you can then reach out to them via LinkedIn (which also generally causes an email to them. In this way, LinkedIn is like a huge virtual rolodex to organize and manage your business contacts.

## **Working with 2<sup>nd</sup> Level Connections**

While you can direct message (send emails or see the email addresses of) 1<sup>st</sup> level connections, this is not true of 2<sup>nd</sup> level connections (who are the 1<sup>st</sup> level connections of your 1<sup>st</sup> level connections). However, LinkedIn allows you to ask for an “introduction” from a 1<sup>st</sup> level connection to a 2<sup>nd</sup> level connection. Note: you can no longer ask for “introductions” of 2<sup>nd</sup> level connections on the *desktop* version of LinkedIn, but you can still do this on the *mobile phone / app* version of LinkedIn.

Here’s a typical scenario for 2<sup>nd</sup> level connections.

Let’s suppose you are the sale manager for a company in the Proteomics industry. (*Proteomics is the large scale study of proteins and is used heavily in industry to analyze organic materials*). You’re going to “Proteomics World” in Boston, and you’ll be introducing your new “Proteomics 2000” product to the industry. You are planning on having one of those fun-filled wine and cheese parties, where your company will roll out the red carpet with free food and wine, and in exchange, attendees will be updated on your “Proteomics 2000.” It’s a business meeting with a little fun, a little free food and drink, and some salesy information about your new product.

Your job is to get people to attend. You go to LinkedIn and search for:

*Proteomics*

*Check: People*

*Check: 1<sup>st</sup> level*

*(You also select Locations > Greater Boston area, as the show is in Boston).*

You can direct message all of these 1<sup>st</sup> level people and invite them to the wine and cheese event. Remember: social media is a *party*, not a *prison*, and in terms of content you have something *fun* and *interesting*: your *wine and cheese event*.

Secondarily, on your mobile phone / app version of LinkedIn, you can search for

*Proteomics*

*Check: People*

*Check: 2<sup>nd</sup> level*

*(You also select Locations > Greater Boston area, as the show is in Boston).*

Here, although you cannot see the contact information on the 2<sup>nd</sup> level connections, you can ask for an introduction from a 1<sup>st</sup> level connection. This is akin to being at a trade show event, going up to a 1<sup>st</sup> level connection who knows someone whom you want to get to know, and asking for an introduction. Then your 1<sup>st</sup> level walks over to your 2<sup>nd</sup> level (his 1<sup>st</sup> level), and introduces you. Susan (your 1<sup>st</sup> level) introduces you to Bob (her 1<sup>st</sup> level, and your 2<sup>nd</sup> level connection):

*“Hey Bob, I’d like you to meet Jason. He’s the Proteomics marketing manager over at PT Inc. They’re having some sort of a wine and cheese event, and I thought you two might get to know each other.”*

Or structurally:

*First level > reason to ask for an introduction > introduction to 2<sup>nd</sup> level > and (hopefully) the 2<sup>nd</sup> level becomes a 1<sup>st</sup> level (accepts your request).*

Essentially, do your search by keyword, filter for 2<sup>nd</sup> level connections. Find a connection that interests you, and click on her name. Then, scroll down and on the far right hand column you’ll see “How You’re Connected.” Choose a 1<sup>st</sup> level connection, and then click on the “Ask so-and-so for an introduction.”

Here’s a screenshot from my iPhone:

## Highlights



### 2 Mutual Connections

You and Von both know Amy Jones and Rafi Chowdhury

[See who can introduce you](#)

You then click on “See who can introduce you.” Then, you get to a message box where you can type a personalized message to your 1<sup>st</sup> level connection, asking him or her to introduce you to your target 2<sup>nd</sup> level connection:

✕ **Ask for an introduction**

Sending Rafi a message. ✕

Hi Rafi, I was wondering if you can introduce me to Von Galt? I'm looking for...



**Von Galt**  
WordPress, Front-End, & UI/...

**Send message**

In this way, you can use your mobile phone / LinkedIn App to identify relevant 2<sup>nd</sup> level connections, and then “use” your 1<sup>st</sup> level connections to ask them to introduce you to

these new 2<sup>nd</sup> levels. Once your 2<sup>nd</sup> levels accept your connection request, then they become 1<sup>st</sup> level connections, and you can directly message them via LinkedIn. Thus the circle of schmoozing continues...

Alternatively, you can send an InMail (see <http://jmlinks.com/3m>) with a paid account, but it's probably more effective to "get introduced" as it would be in a real-world business encounter. After all, people trust people they know more than a "cold" call or a "cold" InMail / email.

*It's not what you know (in business). It's who you know.*

The bottom line, therefore, is to use your 1<sup>st</sup> level connections to get to your 2<sup>nd</sup> levels, and the **TODO** for LinkedIn is to constantly be expanding your 1<sup>st</sup> level network, but how?

**VIDEO.** Watch a video tutorial on how to work with 1<sup>st</sup> and 2<sup>nd</sup> level connections on LinkedIn at <http://jmlinks.com/16s>.

## **How to Expand Your LinkedIn Connections**

If having many connections is the name of the game on LinkedIn, how do you grow your connections? Here are some strategies:

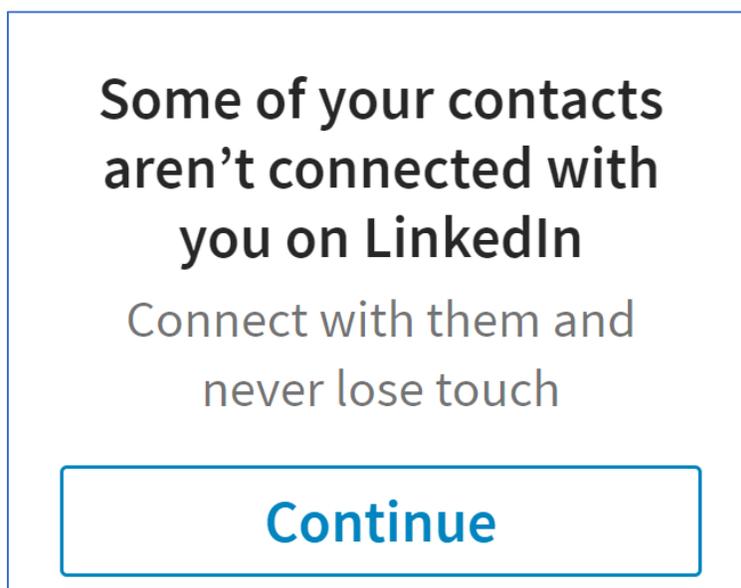
**Ask.** Continually ask every business person you meet for their email, and then look them up on LinkedIn. Next click the Connect button and then fill out the information as indicated (you'll need their email and then write a note as to how you met them). I recommend customizing your personal notes, such as "*Hi Sallie! You and I met at Proteomics world last week, and I'd like to connect with you on LinkedIn.*" If she accepts, she becomes a 1<sup>st</sup> level connection.

**No Spamming.** Do not contact people you do not know because spamming LinkedIn can lead your account to be deactivated.

**Lifetime Limit.** Indeed, there is a lifetime limit of 5000 invitation requests, designed to prevent connection spamming.

**Get People to Ask You.** Even better than asking people to connect to you, is to get them to ask you. Ideas for this would be:

- **Real World to LinkedIn.** If you give a presentation at a trade show, ask attendees to connect with you on LinkedIn. Include LinkedIn on your business cards, and literally mention LinkedIn when you meet business associates in real life.
- **Your Website or Blog.** Place the LinkedIn icon on your website or blog, and encourage visitors to connect. (To generate a personalized LinkedIn badge, visit <http://jmlinks.com/12r>).
- **Other Social Media.** Connect your LinkedIn to your Twitter, Facebook, Google+, etc., and encourage people who already follow you on Twitter, for example, to connect with you on LinkedIn. If you have an email list, ask people to connect to you by emailing them.
- **Uploading Your Contacts.** LinkedIn is happy to scour your email connections directly. To do this, click on My Network, and then on the left, find the icon that says, “Some of your contacts aren’t connected with you on LinkedIn - Connect with them and never lose touch” Here’s a screenshot:



The point is to do everything you can to encourage business contacts to connect with you on LinkedIn, because the more you grow your 1<sup>st</sup> level contacts, the more you can directly connect to them, and the more you can use them as introductions to their 1<sup>st</sup> level contacts, i.e., your 2<sup>nd</sup> level contacts. *Schmooze, schmooze, schmooze* to grow your LinkedIn network!

### **With Whom Should You Connect?**

There are different strategies in terms of reaching out, or accepting, the connection requests of others on LinkedIn. There is no right answer. For someone who is customer-facing (e.g. sales), he or she should probably accept every inbound request. For someone who is a venture capitalist, he or she might accept requests only from people they really know. Another strategy is to only accept requests from people for whom you'd actually do a favor in real life. I generally accept everyone who wants to connect with me, and then if they start spamming me with InMails, I disconnect from them. Typical connection strategies are thus:

- Connect with everyone who sends you a connection request, regardless of whether you know them or not. Then unconnect if they spam you.
- Connect only with people you actually have met in real life or some capacity, as for example, people you've met at a trade show or know via a LinkedIn group.
- Connect only with people you actually know in real life, like coworkers, people at customer companies you've done projects with, etc.
- Connect very selectively, like only with people who are very close business connections. (A venture capitalist or CEO might use this strategy).

There's no right or wrong answer.

### **Are Paid LinkedIn Accounts Worth It?**

Unless you are an active recruiter, an active job seeker, or an outbound sales person actively "cold calling" or prospecting, I do not generally recommend paid LinkedIn accounts. The main advantages of a paid LinkedIn account (of which there are several types) are:

- Enhanced cosmetics for your profile, such as a larger photo;
- Better positioning when applying for a job;
- Access to everyone who's viewed your profile in the last 90 days;
- Ability to see 3<sup>rd</sup> degree profiles;
- Additional search filters, and the ability to filter and save search results (great for sales prospectors);
- Learning Resources.
- Up to 15-30 InMails per month to directly contact anyone on LinkedIn, even if you are not connected; and/or (depending on the package you get)
- More detailed analytics.

To learn more about LinkedIn Premium, visit <https://premium.linkedin.com/>. For a very helpful comparison of accounts, visit <http://jmlinks.com/3n>.

Your **TODO** here is to brainstorm a logical connection philosophy. If your purpose on LinkedIn is to use it for customer outreach and heavy schmoozing, then connecting with anyone or everyone makes sense. If your purpose is more passive or more secretive, perhaps just using LinkedIn as a public resume, and/or to keep up-to-date on industry trends, then connecting only with real-world connections makes sense. Remember: once you accept a connection request, you become a 1<sup>st</sup> level connection, meaning that person can directly contact you via LinkedIn and email, as well as see your contact information. Similarly, he or she can see your 2<sup>nd</sup> level connections (unless you block that in settings). So, if you need to be more secretive, then be more judicious about with whom you connect. If not, not. There is no right or wrong connection strategy: just pre-think a strategy that makes sense for your marketing objectives.

And, remember, it's not just about "you," it's about "you" and "your team." LinkedIn is a team networking sport at the corporate or business level!

### **Brainstorming a Schmoozing Strategy**

For your third **TODO**, download the **LinkedIn Schmoozing Worksheet**. For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code '2018social' to register if you have not already done so), and click on the link to the "LinkedIn Schmoozing Worksheet." You'll brainstorm your strategy for growing your LinkedIn connections. (Remember to do this with each and every customer-facing employee).

## » BEING ACTIVE ON LINKEDIN: POSTS AND ARTICLES

In the real world of business, it's a truism of marketing that you need to "look active." People respect people who are involved and engaged, and look down on people who seem to be doing nothing. Similarly, on LinkedIn it is important to present at least the appearance of activity. By being active, you "look active" (a **trust** indicator) plus you have new ways to reach out to prospects and customers to stay top-of-mind and generate business inquiries.

Posting frequently and being active in LinkedIn groups, in short: a) makes you seem active (and therefore trustworthy), and b) gives you more opportunities to be top of mind among prospects, thereby increasing opportunities for connections and business engagements. I'm not saying you should be fraudulent. But, just as at a business networking event, be active and engaged in a serious way. Participation is important!

**Remember:** LinkedIn is a team sport, and only individuals can post to their own accounts. Getting employees to post and be active is yet another example why getting all your customer-facing employees "on board" is a key element of LinkedIn success!

### Posts and Articles

The first way to do this is to post informative content to LinkedIn on a regular basis via *posts* and *articles*, and the second, is to participate in LinkedIn Groups. Let's look at each in turn.

Just as on Facebook, if you share a *post* to your profile and I am a 1<sup>st</sup> level connection, then that *post* has a good chance of showing in my *news feed*. The news feed on LinkedIn is the first content that greets me when I login.

Here's a screenshot of my news feed:

The End of Job Hunting - Make companies apply to you instead of wasting your time! Try

Share an article, photo, or update

Write an article Image Post

Sort by: Top

Dean Pichee commented on this

**Ande Kempf**  
Marketo Champion & Certified Expert | Marketing Manager at BizLibrary  
7h

The marketing department at [BizLibrary](#) has a new Account Based Marketing Director position open. If you're in the STL area and think you would be a good fit or just wanted to know more, PM me. Your boss would be rad ([Erin Pinl](#) ...see more)

17 Likes · 2 Comments

Like Comment Share

Show previous comments

**Dean Pichee** I think you are both rad-diculous! 6h ...  
Like Reply | 2 Likes

Add a comment...

Dean Pichee, with whom I am a 1<sup>st</sup> level contact, commented on a post by Ande Kempf, with whom I am a 2<sup>nd</sup> level connection. Posts by 1<sup>st</sup> level connects directly show in my news feed. So the process is:

*Identify items of interest to your business contacts (your own content or that of others) > Share posts on them to LinkedIn > Your connections see them in their news feeds (and hopefully get excited about doing business with you and/or your company). As on Facebook, the more they “like,” “comment,” and/or “share” your posts, the more the LinkedIn algorithm will think you’re important, and the more your posts will be seen in the news feed by your connections. Don’t be boring!*

**Content** is king, and queen, and jack on LinkedIn as on all social media. Turn back to your Content Marketing plan, and remember you’ll need both other people’s content and

your own content share on LinkedIn as *posts* or as *articles* to *Pulse* (more on *Pulse* in a moment). But first, here are some ideas of what you can share as *posts* to LinkedIn:

- **Blog Post Summaries.** To the extent that you have an active blog and are posting items that fit with LinkedIn’s professional focus, post headlines, short summaries and links to your blog.
  - Note that the first or “featured” image will become the shareable image, and that the META DESCRIPTION will become the default description when sharing. Choose striking, fun images for your blog posts!
- **Quotes.** People love quotes, and taking memorable quotes (on business themes) and pasting them on graphics is a win/win.
- **Comments and Engagements on Industry Items.** Identify, comment, and share items that are relevant to your industry, and especially to the interests of your target customers. Be that “helpful expert” on LinkedIn that people turn to for what’s happening.
- **Infographics and Instructographics.** Factoids, how to articles, top ten lists, 7 things you didn’t know lists, especially ones that are fun yet useful, are excellent for LinkedIn.
- **Quizzes, Surveys, and Response-provoking posts.** Ask a question, and get an answer or more. Great for encouraging interactivity, especially when the interaction is business-oriented. A great idea is to mention a project you are working on, and ask for feedback before, during, or after.

Turn to the content marketing section of the *Social Media Toolbook* for a list of tools that will help you find other people’s content and create your own. I recommend Hootsuite (<https://www.hootsuite.com/>) to manage all your social postings across platforms. I recommend Feedly (<http://www.feedly.com/>) as a way to organize industry blogs and the content of other people, so that you can be a useful sharer of third-party information on LinkedIn.

## **LinkedIn Pulse**

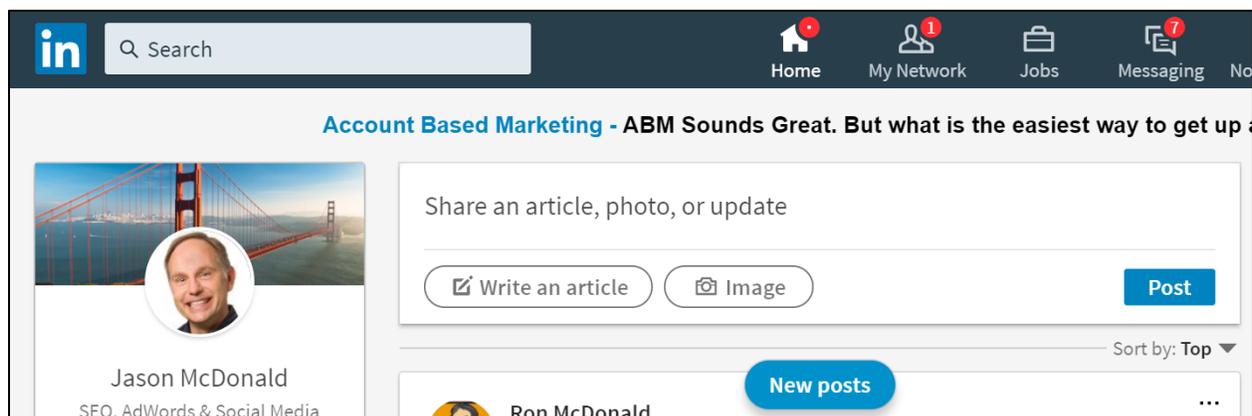
One opportunity not to be missed on LinkedIn in terms of posting is *LinkedIn Pulse* (<http://jmlinks.com/31g>). LinkedIn is aggressively trying to grow its role not only for job seekers but for the fully employed. *Pulse* is LinkedIn’s internal blog, and anyone (including you) can easily post an *article* to *Pulse*. Be sure to get the LinkedIn lingo: a *post* is when you share something external to LinkedIn such as a link to a blog post on your

company blog, whereas an *article* is when you write (and share) something to LinkedIn's *Pulse* platform.

As you brainstorm topics to write *articles* for LinkedIn *Pulse*, here are the steps:

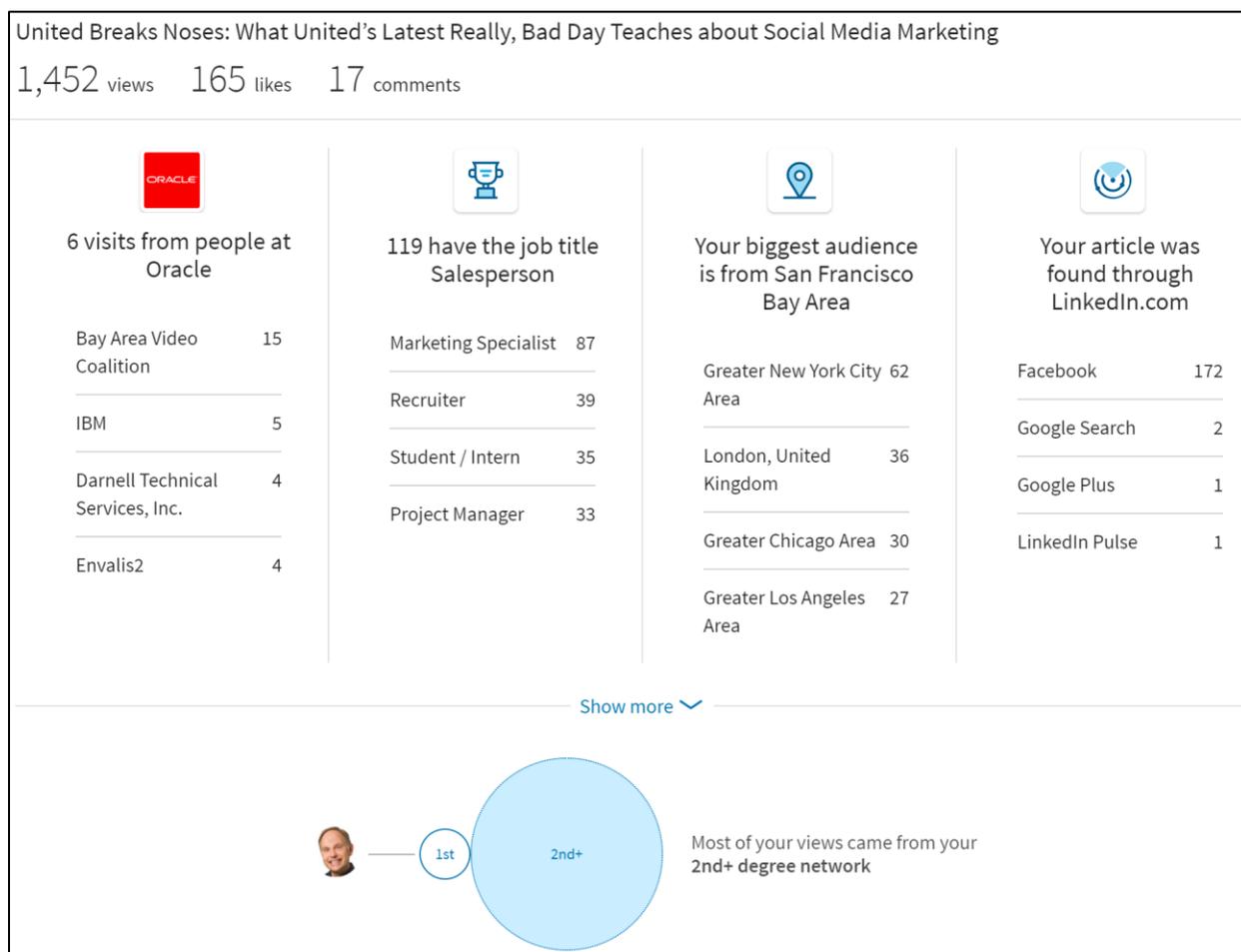
1. **Identify a topic** that will interest your prospects and customers, such as an industry trend or a common “pain point” in your industry or more generally in business.
2. **Brainstorm and identify keywords** using tools like Google suggest, Ubersuggest, or the Google Keyword Planner. (See <http://jmlinks.com/smmdash>, keyword search for these tools).
3. **Write a strong article with a great headline**, catchy first paragraph, and some substantial content that will be useful to readers and position you as a “helpful expert.”
4. **Tag your *Pulse* article with relevant tags** – these influence whether your *Pulse* post will show in their news feed and/or relevant searches.

Inside of LinkedIn, *Pulse* lives under the icon “Write an article.” Here’s a screenshot:



To write an article on *Pulse*, just click on the “Write an article” and start writing. LinkedIn is very keen to promote articles to *Pulse*. What with LinkedIn’s acquisition of Lynda.com and being now owned by Microsoft, the network is trying to grow beyond job search to be more a site for “lifetime professional learning.” Piggyback on this trend, and LinkedIn will promote your *Pulse* articles not only to your own connections but even to people you do not know. For this reason, *Pulse* is a great promotion strategy!

You can see a *Pulse* article by me on “United Breaks Noses: What United’s Latest Really, Bad Day Teaches about Social Media Marketing” at <http://jmlinks.com/31h>. If you are the article owner, LinkedIn will also show you nifty metrics on who viewed the article and what types of people they were. Here’s a screenshot:



## ***Pulse* Reaches Beyond Your Connections**

LinkedIn *Pulse* also allows individuals with whom you are NOT 1<sup>st</sup> level connections on LinkedIn to “follow you.” Even better, when you share your *Pulse* article on other social networks (e.g., Twitter, Facebook, Google+) and encourage people to cross over to LinkedIn, LinkedIn monitors this activity. If you get enough momentum, a *Pulse* article can “go viral,” and really supercharge your LinkedIn connections.

LinkedIn’s own marketing team is keen to promote *Pulse*, so if you’ve written something substantial, be sure to tweet your *Pulse* post to LinkedIn Marketing at

<https://twitter.com/LinkedInMktg>. Therefore, a strong *Pulse* posting strategy can position you as a “helpful expert” to new people, and is not an opportunity to be missed! Mix posts to LinkedIn from your own blog, content from others, and native articles to *Pulse* on your LinkedIn timeline.

For your fourth **TODO**, download the **LinkedIn Posting Worksheet**. For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code ‘**2018social**’ to register if you have not already done so), and click on the link to the “LinkedIn Posting Worksheet.” You’ll create a systematic plan for posts to LinkedIn, both your own content and the content of others.

As much as it is fun and easy to post, the reality of LinkedIn today is that outside of job seekers, not everybody checks LinkedIn on a daily or even weekly basis. So while posting frequently to LinkedIn is a good idea, recognize that LinkedIn does not have the sheer volume of Facebook in terms of active engagement. Keep that in mind when you measure the ROI of posting frequently on LinkedIn.

**VIDEO.** Watch a video tutorial on how to share posts and articles to LinkedIn at <http://jmlinks.com/16t>.

### **How frequently should you post?**

Now that the LinkedIn news feed is very crowded (and the reality is that only few people outside of job seekers and outbound marketers check their feed daily), you can safely share posts and/or articles quite frequently, even several times a day. But this differs with your audience, so pay attention to your shares, by monitoring thumbs up and comments (*for LinkedIn posts*) and stats (*for Pulse articles*). Your goal is to be interesting, informative, useful, and friendly as trust indicators and hopefully get social spread among your LinkedIn connections, especially via *Pulse*. Note that you can see who responded to your *Pulse* posts, and this gives you an opportunity to connect with them. Finally, an *article* to *Pulse* should be a more thoughtful, in-depth piece of content vs. a *post* to LinkedIn which can be short and simple, as simple as just your thoughts on something trending in your industry or a short headline and link to an interesting article written by someone else.

## » BEING ACTIVE ON LINKEDIN: LINKEDIN GROUPS

With LinkedIn's growing emphasis on "professional learning," it should come as no surprise that LinkedIn has a growing ecosystem of groups on every topic imaginable. Compare LinkedIn groups to the "break out" sessions at your industry trade show: interested parties show up, listen to each other, participate in discussions, and showcase their questions (and answers) on professional topics. Oh, and occasionally, they use groups as yet another opportunity to **schmooze** (*surprise!*). By participating tactfully in LinkedIn groups you can grow your prestige (and that of your company). It's a soft sell environment, however, anyone who is a member of a group that you are a member of is a good prospect to become a LinkedIn 1<sup>st</sup> level connection.

To find relevant groups, simply search LinkedIn by keyword and then click on "Groups" on the top row. LinkedIn will return a list of relevant groups; simply click on the group to learn more about it, or click the blue "join group" icon.

Note that there are two types of groups: **closed** and **open**. **Closed** groups are indicated by the word "ask to join"; by clicking "ask to join," you are requesting the group moderator to approve your membership. To learn more about LinkedIn groups, read the official help file at <http://jmlinks.com/31j>.

### Group Promotion Strategy

LinkedIn is a serious social media platform; so please don't "spam" groups with self-serving "buy my stuff" messages! Instead, join relevant groups, pay attention to the on-going discussions, and post informative and useful content. It's a soft sell environment. Let group members realize how smart and useful you are, and then reach out to you directly.

As you research (or join) groups, pay attention to the quality of the discussions. Some groups are fantastic: full of motivated, informed, honest people. Other groups are quite spammy with everyone talking, and few people listening. Just as at a professional trade show, be choosy with your time and efforts. Not all groups are created equally.

Your **TODO** for groups is simple:

- **Log on** to your LinkedIn account.
- **Search for relevant groups** by keyword.
- **Identify** interesting and useful **groups**, and join them (or apply to join if it's a closed group).

- **Monitor** and begin to **participate**.
- Diplomatically position yourself (and your company) as a **helpful expert**.

## Join the Groups of Your Customers

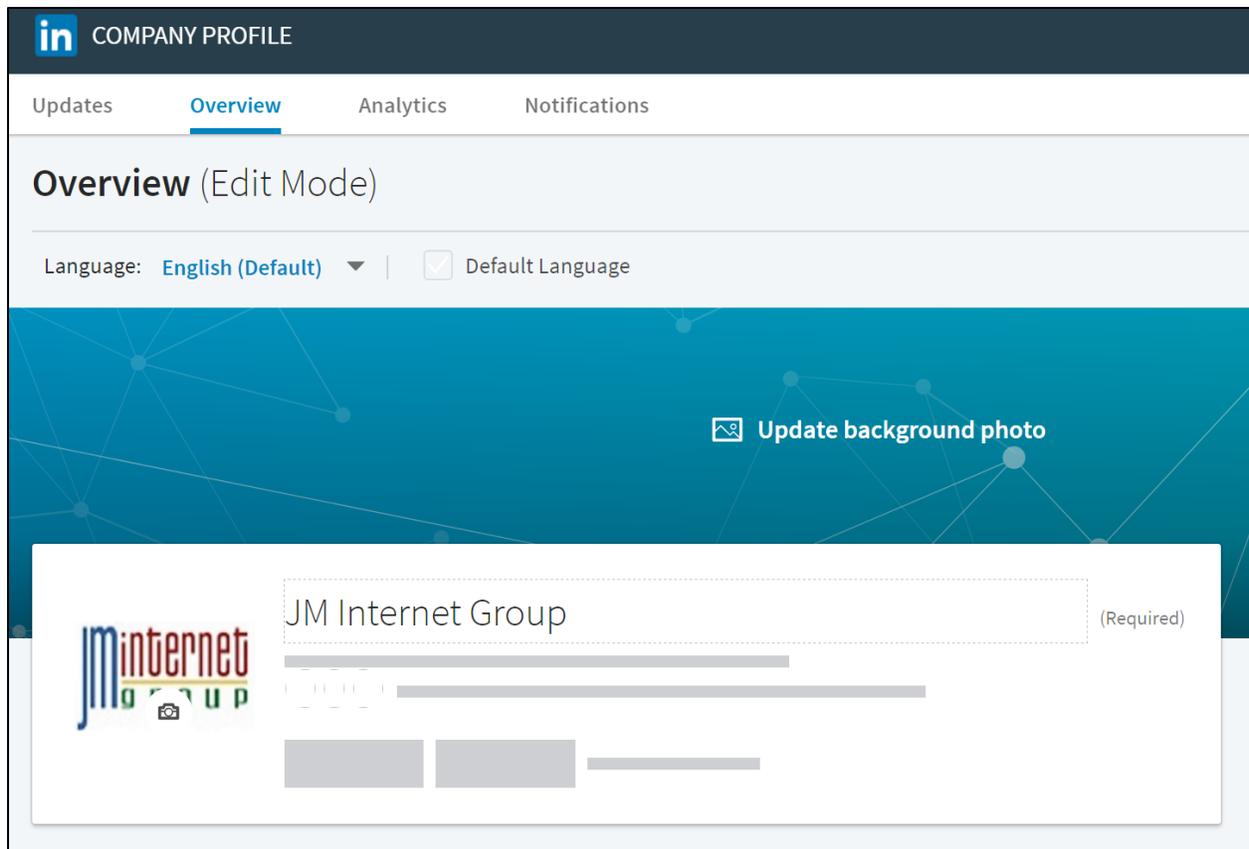
Here's a tip for marketers. Don't just join groups that are relevant to your professional interests; join groups that your interest your target customers. A WordPress web designer, for example, would join groups on WordPress to boost her professional skills but also join (and participate in) groups for small business owners, where she could contribute to the discussion and in a very "soft sell" way, showcase her skills on WordPress. By joining groups that are *relevant to her customers* and being a "helpful expert" in those customer-facing groups, she builds her brand and leverages LinkedIn far more effectively than by joining groups *of her peers (and competitors)*.

## » LINKEDIN COMPANY PAGES

Like Facebook, LinkedIn offers company Pages. And like Facebook, you must first have an individual profile to create (or manage) a company page. To view the official LinkedIn information on company pages, visit <http://jmlinks.com/3h>. The steps to create a business Page on LinkedIn are:

1. Sign in to your personal profile.
2. Click on <http://jmlinks.com/3j>.
3. Add your company name, and your email address, matching the company website domain.
4. Enter your company name.
5. Enter your designated Admins.

Now that you have created a company Page, it's time to optimize it. Login in, first, to your personal profile. Next click on Me, and the pull down arrow. Find your company in the list as indicated by *Company Page*. You can also just search for your company by name and click "Manage Page." Next, when you're in your Company Page, then click on Overview. This allows you to update your background photo, company description, and specialties. Here's a screenshot:



There's not much to a LinkedIn Company Page. You can only optimize:

- **Company Name.** Enter or adjust your company name, accordingly.
- **Company 'About us'.** Enter a keyword-heavy yet relevant description of your company. Explain your value proposition: what can you do for LinkedIn members?
- **Designated Admins.** Located under Admin Tools > Manage, here, you can add or remove Admins. Any Admin has full `control of the page; so if you terminate an employee, remove them first!
- **Background Photo.** Similar to the Facebook cover photo, you can change your LinkedIn (cover) image.
- **Company Logo.** Similar to the Facebook profile picture, you can change your LinkedIn Profile picture.
- **Specialties.** These function as keywords for indexing purposes.
- **Featured Groups.** You can feature relevant groups, just as you would at the individual level.

The reality is that few people “search” LinkedIn to find companies. So the bread-and-butter of your company page is to post interesting items (both your own content and that of other people) to people who follow your page because externally they have already decided to follow you. For example, existing customers or people who find your blog interesting might “follow” your company on LinkedIn to stay updated.

For tips from LinkedIn on how to nurture effective company Pages, please visit <http://jmlinks.com/3k>.

### **Page Posting Strategy**

Although most of the action on LinkedIn is at the profile to profile level, you can post via your company Page as well. Just as with a profile, the trick is to identify interesting, engaging content (both your own and that of others) to post to the Page. In reality, you can cross-post content on both employee profiles and the company page. For example, if the director of marketing writes an informative piece for LinkedIn *Pulse*, you can “cross post” this to your LinkedIn company feed. Similarly, you can identify interesting industry-related articles on Feedly, and share this content at both the profile and Page level.

To share a *post*, just login to your Company Page, and click on the “Share an article, photo, or update” box. This is confusing because the box says “article, photo, or update” when really there are only three options here:

1. **An update.** Just type in a short sentence about something new or exciting about your company, such as “See us at Booth 262 at the Consumer Electronics Show 2018!”.
2. **An article** (*which, to be consistent, they should have called a **post***). Just type in a short summary and a link to a post to your own company website or blog, such as “Read our blog post on what we did at CES 2018 at <http://bit.ly/123>).
3. **A photo or image.** Just upload a picture from your computer with a short headline such as, “Check out this picture of our Booth Staff at CES 2018.”

**Note:** Company Pages cannot post to *Pulse*; only individuals can!

Essentially, you are trying to position your company as a “helpful expert” on a relevant topic, by posting:

- **Your own content** such as your company’s blog posts, videos on YouTube, infographics / instructographics, reports, eBooks, industry studies that deal with industry issues in an informative way;
- **Other people’s content** similar to the above. Remember to post the content of your own employees!
- **Self-promotional content** like announcements of free Webinars, eBooks, upcoming trade shows, new products, etc.

Note that your **posting rhythm** of *fun, fun, fun, fun, buy my stuff* on Facebook translates on LinkedIn to:

*useful, useful, useful, useful, useful, useful, useful, attend our webinar, useful, useful, useful, useful, useful, useful, download our free eBook, useful, useful, useful, useful, useful, useful, visit us at the tradeshow...*

### **Get Employees to Post Your Content as Well as Your Company Page**

And remember, LinkedIn marketing is a **team sport**: if you have a great blog post, video, or infographic, have it posted not only to your company LinkedIn page but have key employees share it as an update on their own LinkedIn profiles as well!

In other words, make 80% or more of your posts useful, and only 20% or less, shameless, self-promotional announcements. If you like you can “pin” a company update to the top of your company Page. Simply find the update, and click the “three dots” and then “Pin to top.”

Here are some examples of effective LinkedIn company pages:

- Thermo Fischer Scientific at <http://jmlinks.com/36k>.
- Intel Corporation at <http://jmlinks.com/36m>.
- Monsanto at <http://jmlinks.com/36n>.
- Social Media Examiner <http://jmlinks.com/36p>.

To find companies to emulate, either search LinkedIn directly by keywords, or use this Google trick. Go to <https://www.google.com/> and enter:

site:linkedin.com/company {keyword}

site:linkedin.com/company {company name}

*as for example:*

site:linkedin.com/company "organic food" at <http://jmlinks.com/12t>.

You'll find that LinkedIn is fast becoming a better home for more "serious" or even "boring" companies than Facebook; companies whose business value proposition is more *business-to-business* rather than *business-to-consumer*, and whose customers engage when they are in their work / professional / business mode. Find and follow competitors and companies you admire on LinkedIn.

In sum, if your business is *business-to-business* such as professional services like Web design, accounting, business attorneys, computer services, SEO, social media marketing, marketing services... any business-to-business, professional service, then a company Page on LinkedIn can be a very effective marketing tool.

## » PROMOTING YOUR LINKEDIN PROFILES, POSTS, AND PAGES

Once you and your employees have established their individual profiles, begun to share posts or articles to LinkedIn *Pulse*, set up a company Page, and begun to populate it with posts on a regular basis, you've essentially "set up" the social media party. Now it's time to send out the invitations. In and of itself, nothing on LinkedIn is truly self-promotional.

Remember: social media is a **party**. You must have yummy yummy food and entertainment for people to show up, and stick around. So as you promote your LinkedIn **content**, always keep front and center "what's in it for them" – what will they get by connecting with your employees on LinkedIn or following your company LinkedIn page?

Generally speaking, people on LinkedIn are looking for informative, educational, useful, professional content relevant to their industry and job, so that they can stay informed and educated. If on Facebook the name of the game is *fun*, on LinkedIn the name of the game is *useful*.

# FACEBOOK IS ABOUT FUN; LINKEDIN IS ABOUT USEFUL

Assuming your profiles and Page have lots of useful content, here are some common ways to promote your LinkedIn accounts:

- **Real World to Social.** Don't forget the real world! If you are a serious technology vendor of single board computers, and you're at the industry trade show, be sure that the folks manning the booth, recommend to booth visitors that they "connect" with your employees and "follow" your business LinkedIn Page. *Why? Because they'll get insider tips, industry news, free eBooks and webinars – stuff that will keep them abreast of the industry, and better informed at their jobs.*
- **Cross-Promotion.** Link your website to your LinkedIn profiles and Page, your blog posts to your profiles and Page, your Twitter to your profiles and Page, etc. Notice how big brands like Intel (<http://www.intel.com/>) do this: one digital property promotes another digital property.
- **Email.** Email your customer list and ask them to "connect" with key employees and/or "follow" your Page. Again, you must have a reason why they'll should do so: what's in it for them? Have a contest, give away something for free, or otherwise motivate them to click from the email to your profiles or Page, and then connect.
- **LinkedIn Internal.** More at the profile level than on the Page level, participation on LinkedIn in an authentic way can grow one's follower base. LinkedIn *Pulse* is especially useful for this, as are LinkedIn groups. Internal promotion is not particularly strong on LinkedIn, but it should still be in the mix.
- **Use LinkedIn Plugins.** LinkedIn has numerous plugins that allow you to "embed" your LinkedIn content on your website, and thereby nurture cross promotion. To learn more about plugins, visit <http://jmlinks.com/31k>. In this way, your blog can promote your LinkedIn content, and your LinkedIn content can promote your blog. Similarly, your YouTube videos can promote your LinkedIn Page, and your LinkedIn posts and *Pulse* posts can promote your YouTube Videos and vice-versa.
- **Leverage your Customers.** People who already have connected with you and your company are your best promoters. Remember, it's *social* (!) media, and encouraging your customers to share your content is the name of the game. You want to leverage your connections as much as possible to share your content. On LinkedIn, it's all about being useful! Indeed, a timely article to LinkedIn *Pulse* can be picked up by key influencers, go viral, and exponentially increase your personal and company reach.

# GET YOUR CUSTOMERS TO HELP PROMOTE YOUR LINKEDIN CONTENT

## » ADVERTISE ON LINKEDIN

One of the best ways to promote your content is through **advertising**. LinkedIn offers incredibly focused targeting, and there are three primary ways to advertise:

**Promote your Page Posts.** On your LinkedIn company page, find a post. At the top of the post, click on the gray “Sponsor Now” button and follow the instructions.

**Advertise Directly.** You can create direct ads on LinkedIn to promote either offsite web content, or connect back to your Page or Posts. In terms of LinkedIn promotion, therefore, you can use LinkedIn advertising to grow your LinkedIn company followers by advertising your Page and/or posts.

**Sponsored InMail.** LinkedIn even allows you to send “sponsored InMail,” which is a type of email marketing. Yes, it’s a bit spammy but you can essentially use LinkedIn to send out targeted (unsolicited) emails to prospects.

## Demographic Targeting

As on Facebook, you can **demographically target people** on LinkedIn based on their interests. Whether you’re promoting a Page post, advertising an offlink to your website, or using sponsored InMail, LinkedIn allows you to demographically target:

By **geography**. Target by country, state, city, or town.

By **followers**. Target only to people who already follow your Company Page or exclude your followers.

By **targeting criteria**. Target people specifically by:

*Company name*

*Company industry*

*Company size*

*Job title*

*Job function*

*Job seniority*

*Member schools*

*Fields of study*

*Degrees*

*Member skills*

*Member groups*

*Member gender*

*Member age*

*Years of experience*

*Company followers*

*Company connections*

In this way, you can take a piece of content and laser-target it to LinkedIn users based on who they are down to very specific attributes. The big challenge, however, is that aside from job seekers, many people do not frequently check their LinkedIn news feed. So, whereas Facebook reaches nearly everyone *frequently* (but they're in friends, family, fun mode), LinkedIn tends to reach people outside of job search only *sporadically* (when they're in business learn mode). Therefore, the *reach* of LinkedIn advertising is a bit of a challenge and the cost per click can be pretty high as well.

Visit LinkedIn's information center at <http://jmlinks.com/31m> to access their official information on how to advertise.

## **Think Out of the Box on LinkedIn Advertising**

LinkedIn does not currently allow you to directly promote individual profiles or the posts / articles of individuals via advertising. Only *Pages* (not *Profiles*) can advertise. How can you thus use your company LinkedIn Page to assist your employee posts and articles to Pulse? Here's how:

1. Have the employee **post** to his or her **blog**; and/or
  - Have the employee create an **article** for LinkedIn **Pulse**.
2. **Share** this content as an “**update**” via your LinkedIn Page.
3. **Pay to advertise** this content via your Company Account by clicking the “Sponsor Now” button.

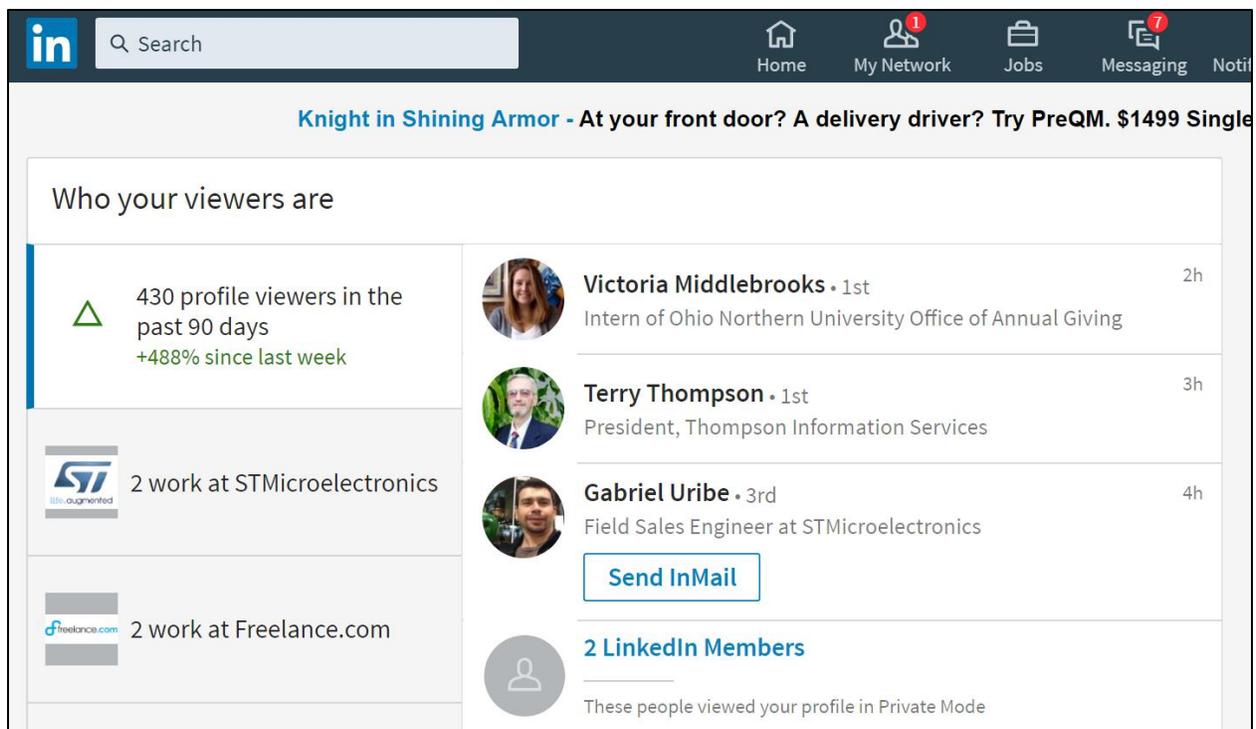
In this way, you can use your company Page to grow the following of individual key employees as well as boost their content for thought-leadership and brand purposes.

## » MEASURING YOUR RESULTS

LinkedIn offers more metrics at the company level than at the personal profile level.

### **LinkedIn Profiles**

First, let's look at the profile level. If you have a free account, login to your LinkedIn profile by clicking on “Me” under your photo. Look for the “Your Dashboard” section in the middle. Then click on “Who's viewed your profile” section on the left. That gets you to LinkedIn stats, such as who has viewed your profile, your posts, and a comparison of how your rank for profile views compared with those of similar people on LinkedIn. Here's a screenshot:



The information for the free account is pretty sparse. Click back to “Your Dashboard” and then click on “Post views.” This gives you metrics for both your LinkedIn *Pulse* articles as well as posts. Here you find detailed information on industries, job titles, locations, and traffic sources. If people interacted with your post by liking, commenting on, or sharing it, then you can also click up to their LinkedIn profile to learn more about them. Indeed, this even gives you an excuse to reach out and connect.

As for your post interactivity, the only data available is to look at each post and eyeball how many comments and likes a post received. By clicking on the like, comment, or share icon, you can see who interacted with a post.

## LinkedIn Pages

LinkedIn Page data is more robust. If you are logged in as the company, simply click on the “Analytics” tab and LinkedIn provides lots of graphical data about your Page and its reach. Click on “Notifications,” and you can see likes, comments, shares, and mentions in more detail.

## Google Analytics

For many of us, we want to drive traffic from LinkedIn to our website, even to our ecommerce store or to download a free eBook or software package to get a sales lead. Sign up for Google Analytics (<https://www.google.com/analytics>) and install the required tracking code. Inside of your Google Analytics account on the left column, drill down by clicking on *Acquisition > Social > Overview*. Then on the right hand side of the screen you'll see a list of Social Networks. Find LinkedIn on that list, and click on that. Google Analytics will tell you what URLs people clicked to from LinkedIn to your Website, giving you insights into what types of web content people find attractive.

You can also create a custom **segment** to look at only LinkedIn traffic and its behavior. For information on how to create custom segments in Google Analytics, go to <http://jmlinks.com/1f>. For the Google help files on segments go to <http://jmlinks.com/1g>.

In sum, inside of LinkedIn you can see how people interact with your Page and updates as well as those made by individual profiles. Inside of Google Analytics, you can see where they land on your website and what they do after they arrive.

### »» CHECKLIST: LINKEDIN ACTION ITEMS

Test your knowledge of LinkedIn! Take the *LinkedIn marketing quiz* at <http://jmlinks.com/qzli>. Next, here are your LinkedIn **Action Items**:

- Research** whether your customers (and competitors) are on LinkedIn. What are they doing? What interests them, and Why?
  - Identify a few **customer profiles** that match your *buyer personas*, and determine how active they are.
  - Identify **companies** to “reverse engineer” who are doing a good job on LinkedIn. Remember to look at the company employees’ profiles as well as the company Page.
- Optimize the LinkedIn Profiles** of key employees vs. target keywords; be sure that each Profile clearly explains the “value proposition” to a target customer.
- Strategize how to **grow the 1st level connections** of key employees, including recommendations and endorsements.

- ❑ Brainstorm **content ideas** that give you something enticing to “offer” to 1st and 2nd level connections (e.g., free eBooks, webinars, interesting articles to Pulse, wine and cheese events at industry trade shows, etc.).
  - ❑ Begin sharing useful posts to LinkedIn aimed at your target customers.
  - ❑ Begin occasionally posting useful *Pulse* articles to LinkedIn aimed at your target customers.
- ❑ Identify, join, and participate in **customer groups** on LinkedIn; do not spam!
- ❑ Set up a **LinkedIn Company Page** and begin posting useful content.
  - ❑ Strategize how to grow / promote your Company Page, including **advertising** to promote your Page content as well as the posts of key employees.
- ❑ **Measure** your **KPIs** on LinkedIn for both Profiles and Pages such as the growth of your connections and the interactivity of your posts and articles.

Check out the **free tools**! Go to my *Social Media Marketing Dashboard > LinkedIn* for my favorite free tools on LinkedIn. Just visit **<http://jmlinks.com/smmdash>**.

## »» **DELIVERABLE: A LINKEDIN MARKETING PLAN**

Now that we’ve come to the end of our chapter on LinkedIn, your **DELIVERABLE** has arrived. For your final **TODO**, download the **LinkedIn Marketing Plan Worksheet**. For the worksheet, go to **<http://jmlinks.com/workbooks>** (click on *Social Media Workbook 2018*, enter the code ‘**2018social**’ to register if you have not already done so), and click on the link to the “LinkedIn Marketing Plan Worksheet.” You’ll brainstorm your strategy for LinkedIn at both the employee (profile) and company (Page) level.



# 5

# TWITTER

Do you Tweet? Should you? Twitter is among the most misunderstood of all the social media. On the one hand, it dominates news and pop culture, giving Twitter a brand presence second only to Facebook. *Ellen DeGeneres tweets. Donald Trump tweets. CBS News tweets.* And so the logic goes: *you better tweet, too.* But, on the other hand, Twitter is so full of noise, news, and craziness that it isn't necessarily a good marketing venue for many businesses. In fact, many businesses tweet and no one is really listening, so Twitter becomes a complete zero in terms of ROI.

In short, Twitter can be an **effective marketing channel** for your business, or Twitter can be a **huge waste of time**. Which is it? Should you use Twitter, and if so, how? The answer, of course, is “it depends.” It depends on whether your customers are on Twitter, and whether you can systematically implement a Twitter marketing strategy.

In this Chapter, you'll learn how Twitter works, how to figure out if Twitter is a good opportunity for your business, how to set up your Twitter account, and – most importantly – how to tweet effectively. Throughout, I will point you to free tools and resources for more information as well as worksheets to guide you step-by-step. Even if you are already tweeting, you'll learn how to really use Twitter for marketing as opposed to just pecking endlessly at 140 characters.

**Let's get started!**

## **To Do List:**

- » Explore How Twitter Works
- » Tweet to Journalists, Bloggers, and Influencers
- » Inventory Likes and Dislikes on Twitter
- » Brainstorm and Execute a Tweeting Strategy

» Promote Your Twitter Account and Tweets

» Measure your Results

»» Checklist: Twitter Action Items

»» Deliverable: A Twitter Marketing Plan

## » EXPLORE HOW TWITTER WORKS

One easy way to understand **Twitter** is to think of Twitter as a **micro blogging** platform. Blogs are all about having an inspiration for a blog post, composing a strong headline, and writing some detailed paragraphs about the topic. Twitter is very similar, just a lot shorter - 140 characters, to be exact. (*Twitter is experimenting with 280 characters for tweets, though that has not been fully rolled out yet*).

Let's compare writing a blog post and composing a tweet.

When you write a blog post, you a) conceptualize a **topic** (*hopefully of interest to your target audience*), b) write a **headline** and the **blog post** itself, and c) **promote** your blog post. Similarly, within the constraints of a 140 character tweet, you a) conceptualize a **topic** of interest to your (potential) followers, b) write a **headline / tweet** (they're basically one-and-the-same on Twitter), and c) **promote** your tweet.

# TWITTER IS MICROBLOGGING

One difference, between Twitter and blogging, is that a tweet often points *outward* to an in-depth blog post, a video, an infographic, or an image. A tweet can be just a "headline" pointing out to the "rest of the story;" think of Twitter as a "headline" service pointing to your blog, YouTube videos, etc. But, tweets can be self-standing as well. In that case, you're really using Twitter like you'd use a blog.

## Twitter is Like Facebook (and Instagram, LinkedIn and Pinterest...)

Structurally speaking, Twitter also shares many similarities with other social media. Like Facebook, LinkedIn, Pinterest and other social media, your Twitter account (a.k.a., “Page”) can be “followed” (“liked”) by others, who are alerted in their news feeds when you tweet new items. In addition, tweets can be discovered through *#hashtags* plus people can *retweet* (share) your tweets, respond to them, or favorite them, thereby drawing the attention of their followers to you.

In fact, as Twitter becomes more visual and Instagram becomes more textual, these two are on a “collision course,” and the world may not be big enough for both of them!

The names may have changed, but the basic structure of Twitter works pretty much like that of other social media platforms:

- Individuals have *accounts* on Twitter (“Profiles” on Facebook).
- Companies have *accounts* on Twitter (“Pages” on Facebook).
- If an individual *follows* your account on Twitter (“likes” your Page on Facebook), then when that company tweets it will show up in the *news feed* of that individual (technically their Twitter *timeline*).
- Individuals can
  - *like* a tweet – “like” a post on Facebook;
  - *respond* to a tweet – “comment” on Facebook; and/or
  - *re-tweet* a tweet to their followers (reshare posts on Facebook).
- They can also create *lists* and *moments*, which are compendia of tweets.

Tweets are short (less than 140 characters), and consist usually of text but can include links, graphics and videos. For the official guide on how to use Twitter see <http://jmlinks.com/31n>.

The structure of Twitter is thus quite similar to that of Facebook; the big differences are that Twitter is shorter, faster, and noisier than Facebook.

## What’s Unique about Twitter?

First and foremost, Twitter is the most open of all the social media. Anyone can set up a Twitter account in literally minutes, and start tweeting – there’s no real authentication. And anyone can listen in: there’s no required friending or connecting as on Facebook or LinkedIn. Indeed, even people who do not follow you can easily find and read your tweets.

They can even contact you, without your pre-approval. Let me repeat these important Twitter facts:

**anyone** can instantly set up a Twitter account and start tweeting: no authentication required;

**anyone** can listen in to anyone on Twitter: no friending required; and

**anyone** can message **anyone** via Twitter: it's completely open!

## TWITTER IS OPEN

So anyone can talk on Twitter, but is *anyone really listening*? That's a different question, and the answer varies a great deal based on your industry, your status, and your skill at building an audience on Twitter.

### **Twitter is Noisy, Really Noisy**

Even worse, because of its openness and because of its focus on short, newsy content, Twitter is a blizzard of information with lots and lots of noise obfuscating the interesting stuff. Whereas Facebook is all about friends, family, and fun “as if” you are at a company picnic or family reunion, Twitter is “as if” you were listening to all talk radio stations and all cable TV stations at the same time.

Amidst the noise of Twitter, the trick is to focus in on your customers and any marketing opportunities.

### **Twitter's Culture**

Twitter's culture is fast-paced and used primarily to share news (about everything) and/or to share gossip (about pop culture and politics). It's also rather rude; cyberbullying and inappropriate, mean-spirited comments are rife on Twitter.

## Is Twitter for You? Tuning In and Tuning Out

With all these pros and cons, the question becomes whether Twitter is for you? If, for example, your business lives in an industry that thrives on news, Twitter may be great for you. If, for example, your business is connected to politics, news, or pop culture, Twitter may be essential to your marketing efforts. If your business is about coupons, special deals, and foodie events, Twitter may be an amazing marketing opportunity. If you attend industry trade shows or want to reach specific journalists hungry for story ideas, Twitter can be your secret marketing weapon. Throughout, keep your eye on how to *tune in* to the appropriate conversations on Twitter and *tune out* the blizzard of useless Twitter noise. Like talk radio or the 365 channels on cable TV, it's all about *tuning in* to an audience to succeed at Twitter marketing.

*Tune in to Twitter conversations that matter to your business, and tune out of Twitter conversations that don't.*

### Sign up for Twitter

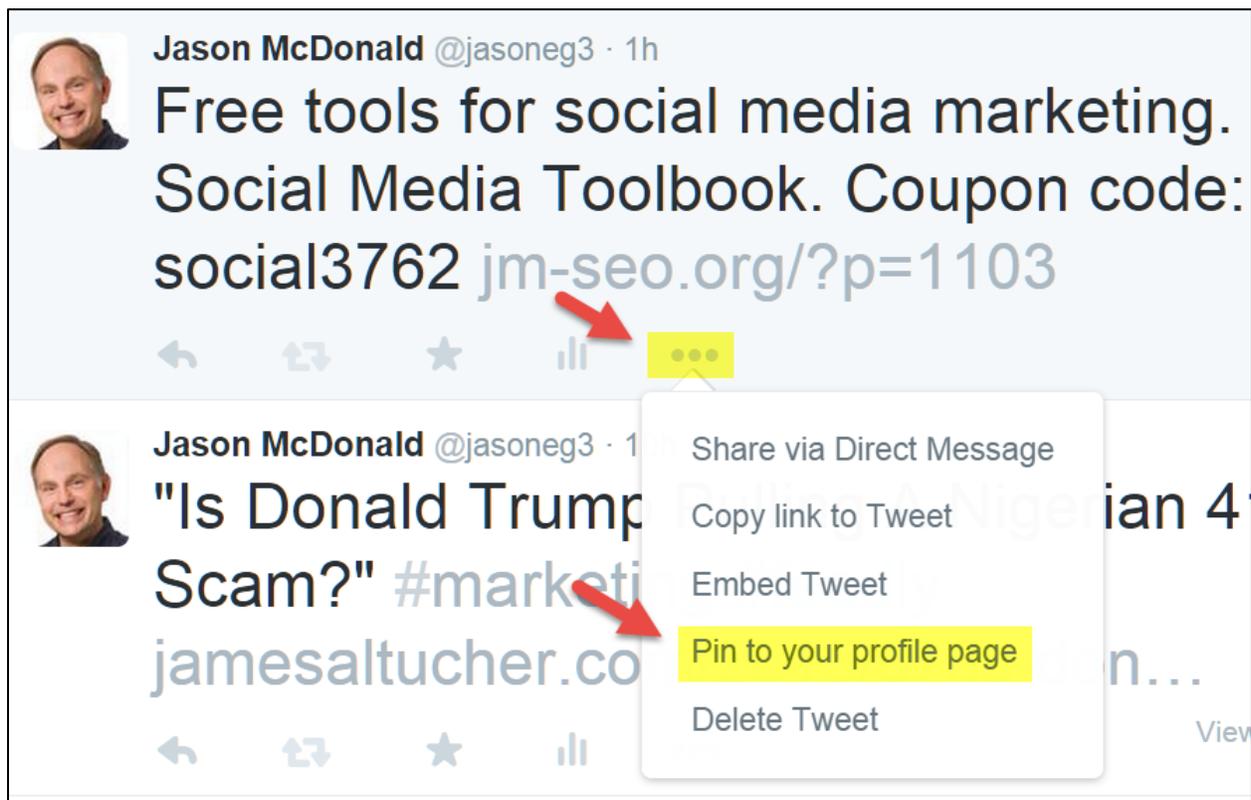
If you haven't already signed up for Twitter, simply go to <http://jmlinks.com/1h>. For more complete information on setting up your business, go to <http://jmlinks.com/1i>.

The basics of a setting up a business Twitter account are as follows:

- **Your Account / Your Username / Twitter Handle.** A username such as **@jmgrp** becomes your Twitter handle or URL (<https://twitter.com/jmgrp>) and shows up in your tweets. Choose a short user name that reflects your brand identity. **Shorter names are better** because tweets are limited to 140 characters and your username or “handle” counts as characters. As with most social media, you need an email address to sign up, or you can use a mobile phone number; unlike Facebook pages, you can only have one email address / password / user – or you can use third party apps like Hootsuite (<http://www.hootsuite.com/>) or Tweetdeck (<https://tweetdeck.twitter.com/>) to let multiple people access your account.
- **Profile Photo.** This is essentially the same as a profile photo on Facebook. The recommend images size is 400x400 pixels. It shows on your Tweets when viewed in a follower's news feed.
- **Bio.** You have 160 characters to explain your company brand, products, and/or services. Be sure to include a <http://> URL link to your company website.

- **Header Image.** Similar to the Facebook cover photo, you get 1500x500 pixels to run as a banner across your account page.
- **Pinned Tweet.** You can “pin” a tweet to the top of your Twitter account, so that it shows first when users click up to your Twitter page. For example, compose a tweet that promotes your email newsletter, and then “pin” this to the top of your Twitter account.

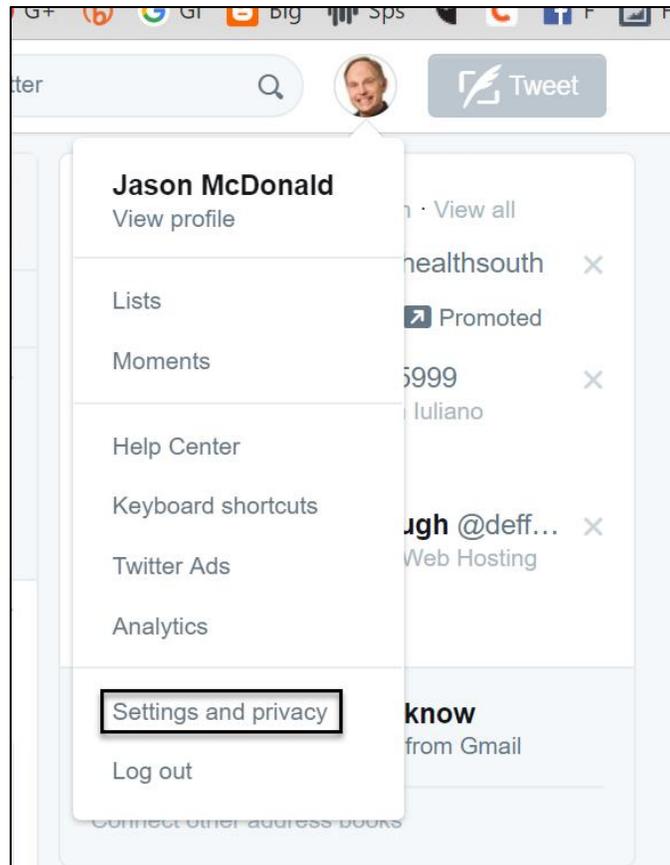
Here’s a screenshot of how to “pin” a Tweet:



Essentially, find the tweet you want to pin, click on the three dots icon, and then click on “pin to your profile page.”

To access any of the other settings and features, go to your page on Twitter (as for example, <http://twitter.com/jmgrp>), be sure you are logged in, and click on the “edit profile” button in the far right of the screen. Also note that by clicking on your (small) Twitter profile picture at the top right of the screen, you can access your account settings (or go here: <http://jmlinks.com/31v> when logged in).

Here's a screenshot:



Not much can be customized, but in this day of Internet hacking and piracy, I recommend that you turn on **login verification**, which will require a mobile phone code for any new login.

## Following and Followers

Now that you've set up your account, you can "follow" people or brands on Twitter by finding their Twitter accounts and clicking on the "follow" link. Similarly, people can follow you on Twitter by doing the same.

This structure is the same as on Facebook: when people follow you on Twitter, they see your tweets in their news feed (Twitter *timeline*) subject to the clutter of the rapidly-moving Twitter news feed and a secret algorithm in Twitter that attempts to prioritize interactive Tweets (e.g., similar to Facebook *Edgerank*). Similarly, you can share the

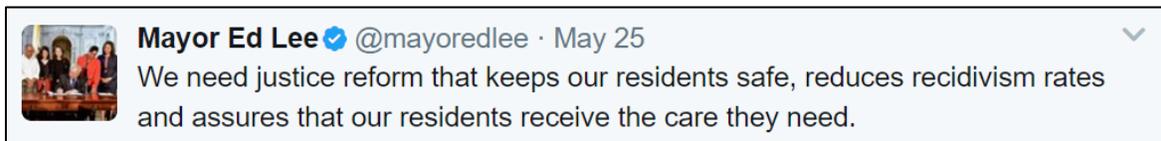
tweets of others (called *retweeting* or *RT*) to your own followers and others can share your tweets to their followers. It's *social* media after all.

## Understand a Tweet

*Tweets* are the heart and soul of Twitter, and correspond to *posts* on Facebook. A tweet is limited to 140 characters, and as you type your tweet into your Twitter account it will give you a convenient countdown of the remaining characters. If you use an app like Hootsuite, that app will also give you a character count. Or you can use a service like <http://www.lettercount.com/> and pre-count your characters.

Think of a tweet as a news headline or very short micro blog post with just a little supporting information. If you tweet a link to a blog post or other Web page, use a URL shortener like <http://bitly.com/>, <http://tinyurl.com/>, or the “shortlink” feature in WordPress, so as not to waste characters. To read Twitter’s own description of how to tweet visit <http://jmlinks.com/1j>. You can create a self-standing tweet, or you can tweet “outlinks” to blog posts, videos, or images.

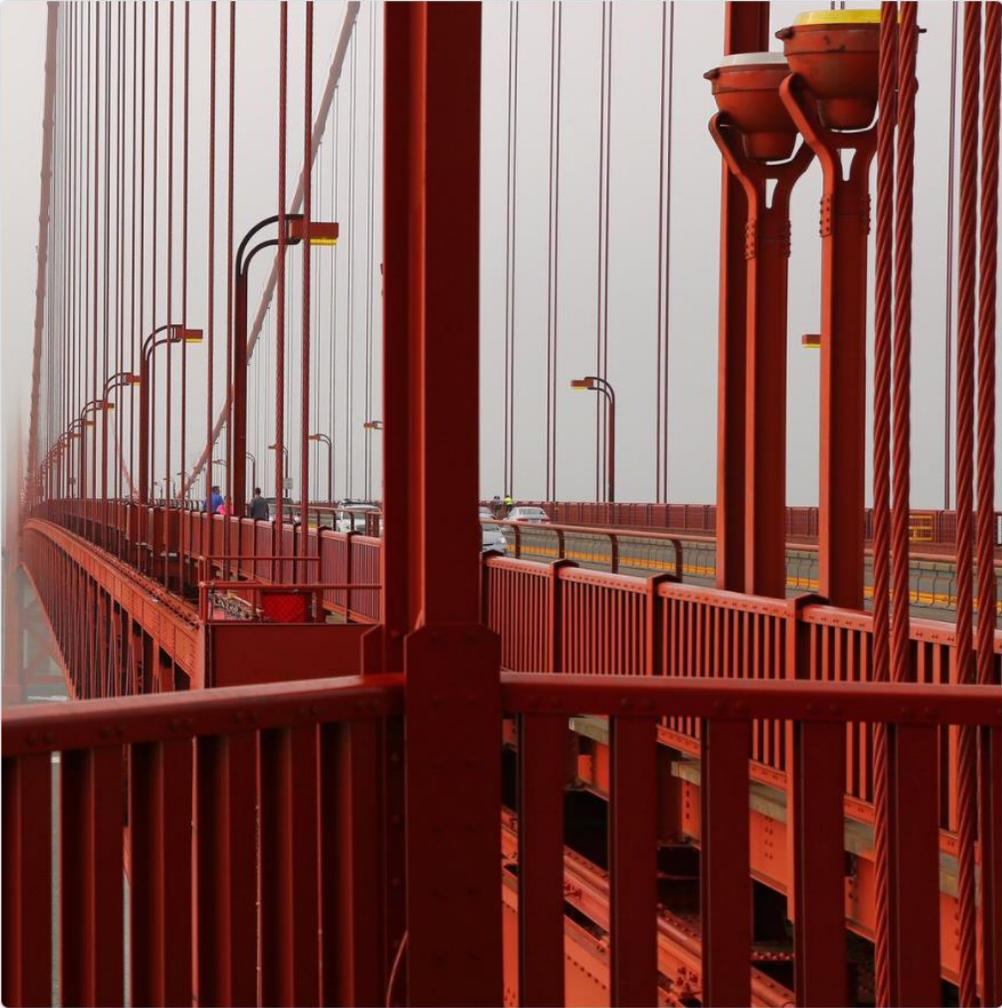
Here’s a screenshot of a tweet by Ed Lee, Mayor of San Francisco:



You can also Tweet photos or videos, making Twitter very much like Instagram. Here’s a tweet by Mayor Lee that is a photo:

 **Mayor Ed Lee**  @mayoredlee · May 27

On the 80th anniversary of the [#goldengatebridge](#) we honor the dedication & craftsmanship of the laborers who worked on the bridge [#GGB80](#)



Golden Gate Bridge, SF Public Works and SFCTA

 3  27  49 

Notice that if your tweet references an external URL, and that URL has a featured image, Twitter will display that image. Here's a screenshot of a tweet by Trend Hunter that has a URL and Twitter "pulls" the image from the referenced website:



And on any tweet, you can see at the bottom replies (comments), retweets (shares), and likes. The goal is obviously to get your fans to reply, retweet, and like your company's tweets!

If you click on a tweet (just click somewhere generally on the text), you can view the conversation going on around that tweet. For example, here's a screenshot of a tweet by President Trump on so-called "fake news" as well as the response by average citizens to Trump's Tweet:

**Donald J. Trump**  Following  
 @realDonaldTrump

It is my opinion that many of the leaks coming out of the White House are fabricated lies made up by the [#FakeNews](#) media.

RETWEETS 13,885 LIKES 53,045

5:33 AM - 28 May 2017

23K 14K 53K

 23K  14K  53K 

 Tweet your reply

 **Trump Tax** @trumptaxme · 12h  
 Replying to @realDonaldTrump  
 Meanwhile, you've cost taxpayers \$37,660,946.76 to support your fancy lifestyle.  
[trumptax.me](http://trumptax.me)

 181  320  2.3K 

 **Wanda Sue Roersma** @SueRoers · 12h  
 If any idea how much the Obamas cost taxpayers. This man takes no salary get an education

This tweet got 13,885 retweets (shares on Twitter), and 53,045 likes. I’m not sure that President Trump understands that people can tweet back at him, publicly, but you should know about this feature on Twitter. Simply click on a tweet to view the “conversation” that is going on around a tweet. In this case, @trumptaxme is commenting that Trump is costing \$37 million to taxpayers. *Any tweet posted by your company can spark a public conversation by anyone, not just followers of your company. Twitter is 110% public, no holds barred social media.*

## Understand Hashtags

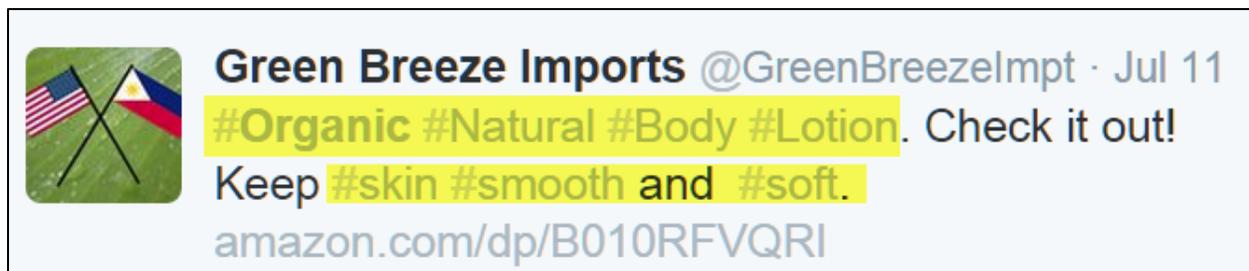
A hashtag (#) in a tweet indicates a keyword or theme and is clickable in a tweet. Think of a hashtag as a keyword / subject / theme about which people are talking: *sports, the Oakland A’s, global warming, the 2020 presidential campaign, the Academy awards.*

Hashtags should be short, and can NOT include spaces. Anyone can create one, and the success, or failure, of a hashtag is a function of whether many, or just a few, people use them. And, yes because Twitter is totally open there is no control: anyone can use them for any purpose, and a hashtag can overlap two discussions.

**Nota Bene:** *Anyone can create a hashtag! Anyone can chime in on a hashtag!  
No one controls a hashtag!*

How a hashtag is used, however, is a function of the crowd: the crowd decides what the hashtag really means.

To find existing hashtags, use <http://hashtagify.me> or simply search Twitter using the # hashtag in front of a topic such as *#organicfood* or *#free*. Note that hashtags can NOT include spaces. So it's *#organicfood* not *#organic food*. Or just search Twitter by keyword and look for the # hashtag symbol. For example, here's a screenshot of a tweet with the hashtags highlighted:



To see the “conversation” on Twitter on *#organic* visit <http://jmlinks.com/31p>. I recommend that you research, identify, and maintain a running list of *hashtags* that are important to your company.

## #HASHTAGS DESIGNATE CONVERSATIONS ON TWITTER

In the tweet above, the hashtags *#organic* and *#natural* are “themes” around which people converse on Twitter. By including hashtags in your Tweets, you can be found by non-followers who are interested in, and following, that topic on Twitter. For example, if you are a seller of organic baby food and have a new flavor out, you might tweet with hashtags as follows:

Hey followers! Our super baby plum recipe is out. **#babyfood #organic #natural #food**. <http://bit.ly/1234>

These hashtags become clickable in a tweet, and for people who are interested in that topic, your tweet becomes part of an enormous conversation around that theme. So, finding popular, relevant hashtags and tweeting on them is a good promotion strategy on Twitter. Remember, however, that you have to stand out and get attention amidst all the noise!

**VIDEO.** Watch a video tutorial on how to use #hashtags on Twitter and Instagram for marketing purposes at <http://jmlinks.com/16u>.

## Understand the @ Sign or Handle

The @ sign designates a Twitter account, often called a “handle” on Twitter. When included in a tweet, it does two things:

- It becomes **clickable**. Anyone who sees this tweet can click on the @handle and go up to that account to view the account and possibly follow that person on Twitter; and
- It **shows up in the news feed of that person** and **sends an email alert** to him or her that they have been mentioned. This is called a *mention*. A *mention* means essentially that: someone has mentioned you (your Twitter account) in a Tweet.

Here’s a screenshot:



KQED (@KQED) has tweeted to its followers that Barry Manilow (@barrymanilow) will be on its show July 4<sup>th</sup>, PBS. Anyone seeing this tweet can click “up” to Barry Manilow’s account, and Barry Manilow would have received a “mention” notification in his account news feed.

## USING THE @ SIGN, YOU CAN TWEET TO ANYONE

Importantly, this openness means that you can tweet “to” anyone on Twitter: it’s completely open, and – unlike Facebook or LinkedIn – you do not need “pre-approval” to converse with someone via Twitter.

Again, when your Tweet contains the @handle of someone else, that generates an alert in their news feed and often via email. **Via Twitter, you can tweet to anyone!** (*More on this in a moment*).

**VIDEO.** Watch a video tutorial on how to use the “@” sign or “handle” on Twitter for marketing purposes at <http://jmlinks.com/16y>.

## Understand Mentions and Retweets

We've already explained a **mention**. When someone includes your @handle in their Tweet, that's called a *mention*: clickable by anyone following them, to go “up” to your account and learn about you or your business.

A **retweet** is a special type of mention, and designated by *RT* on Twitter. In it, person *A* retweets the tweet of person *B*. Meaning, he takes your tweet and tweets it out to his followers. Imagine if Ellen DeGeneres recapped your joke on her TV show. That “retweet” of your joke would spur her followers to learn about you, and might result in a massive increase in your follower count.

Here's a screenshot:



Ellen is “retweeting” Justin Bieber’s tweet about how great their interaction was on her TV show. In this way, her fans see Justin Bieber’s Twitter account *@justinbieber* and can learn about him, and possibly follow him, thereby increasing his follower count. Ellen and Justin are essentially having a public conversation via Twitter.

*You don't have to be a Hollywood star to do this: identify important people in your industry and converse with them via the @sign (handles). Your followers can see this conversation, and their followers can see it too (if the person responds to you) – thereby cross-pollinating your accounts. (See technical details below).*

## **Tweet (Privately) To Someone**

Here's some esoterica about mentions or retweets. When you tweet directly at someone (by including their account (@sign) at the very beginning of your tweet), that tweet is visible to **only** those folks who follow **both** accounts. If you put a dot "." before the @ sign, your tweet shows up in the news feed (officially called your "timeline" on Twitter, but not to be confused with the "timeline" of Facebook) of all of your followers, even if they do not follow the mentioned account. For example, if I tweet:

*@katyperry love your music, give me free concert tickets!*

(shows to **ONLY** those people who follow @jasoneg3 AND @katyperry) and it shows in Katy Perry's own timeline (if she actually checks it)).

vs.

*.@katyperry loved your concert, give me free concert tickets!*

(shows to **ALL** people who follow @jasoneg3 AND it shows in Katy Perry's own timeline (if she actually checks it)).

And, if Katy responded, then she and I would be having a public conversation viewable to her fans, and to my fans.

To read more about the "dot" in front of the "@" sign in more detail, visit <http://jmlinks.com/2k>. For the official Twitter guide to Twitter for Business, visit <https://business.twitter.com/> and for the official Twitter help files, visit <https://support.twitter.com/>.

## **» TWEET TO JOURNALISTS, BLOGGERS, AND INFLUENCERS**

One of the uniquely valuable uses of Twitter is a "deep dive" into using this ability to tweet to anyone. Using Twitter's openness, you can identify journalists, bloggers, or other influencers in your industry and tweet to them. They don't have to pre-approve, or "like" you. Twitter is 110% open.

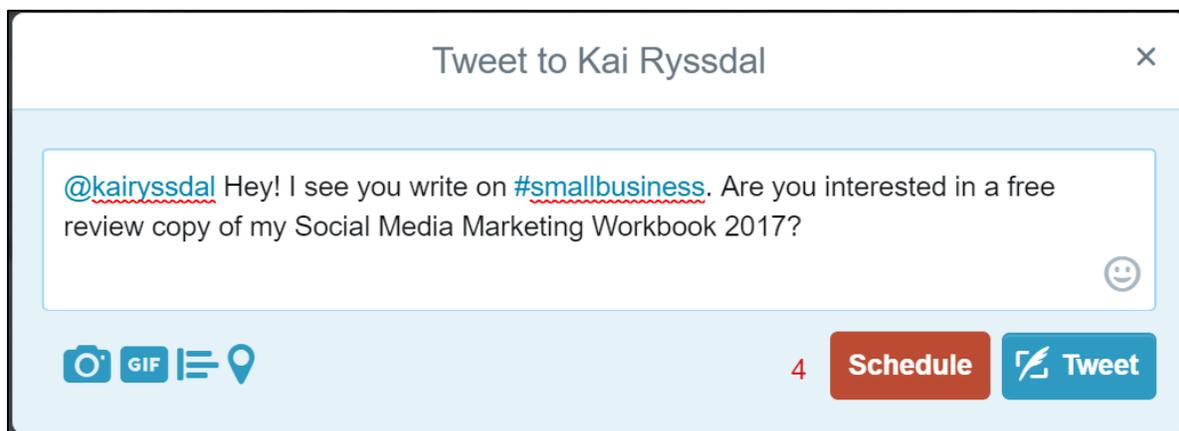
In fact, because Twitter is where news breaks first, it is probably the favorite social media channel of journalists (and our Twitter-infatuated President, Donald Trump). Thus, since journalists and bloggers actively monitor Twitter for news, they are "hungry" for you to "pitch" them story ideas.

**Journalists and bloggers love Twitter, so tweet your news directly @ them.**

Let's say, for example, that I want to send a free copy of my *Social Media Marketing Workbook* to journalists and bloggers who write on small business. First, I'd go to Twitter and identify journalists and bloggers through Twitter and Google searches (*site:twitter.com*) for keywords like *small business journalist*, or *small business blogger*. Then, I'd go to each Twitter account, click on the "Tweet to" icon located just below their profile picture, and copy/paste the following message:

*Hey! I see you write on #smallbusiness. Are you interested in a free review copy of my Social Media Marketing Workbook 2018?*

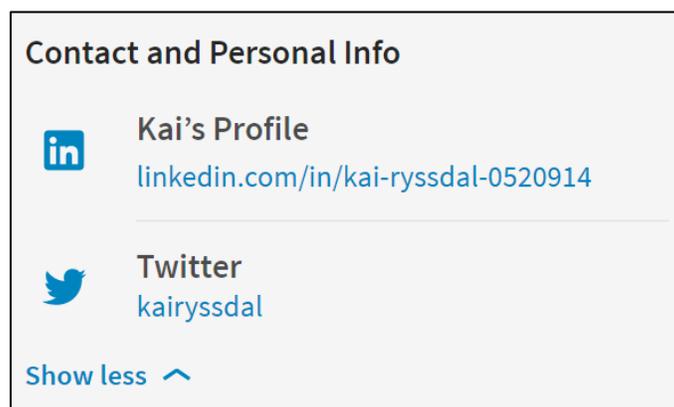
Here's a screenshot of my tweet to journalist Kai Ryssdal (@kairyssdal):



Remember that when you use the "Tweet to" feature your tweet is generally not broadcast to your own followers (though it is still public and discoverable). *In this way, you can use Twitter to send "unsolicited tweets" to journalists and bloggers, without annoying your own followers.* It's not unlike the way you use LinkedIn to reach out to 1<sup>st</sup> and 2<sup>nd</sup> level contacts.

## Using LinkedIn and Twitter in Combination

Indeed, you can even use LinkedIn in combination with Twitter. First, search LinkedIn by keywords, click on *People*, and then browse any level (1<sup>st</sup>, 2<sup>nd</sup>, or 3<sup>rd</sup>), click on *Contact and Personal Info* > *Show More* to find their Twitter account (if they inputted it to LinkedIn). Here's a screenshot of Kai Ryssdal on LinkedIn (with whom I am NOT connected), showing that you can use LinkedIn to “find him,” click on contact info to find his Twitter account, and then use Twitter to tweet to him.



In this way, you can combine the power of LinkedIn's social rolodex to identify journalists, bloggers, and influencers, and the openness of Twitter to reach out to them via “unsolicited” tweets. As is always true on social media, however, don't be spammy. Have a legitimate and interesting reason why you are reaching out to them such as an eBook, new white paper, free product sample, or other item of interest.

## » MAKE AN INVENTORY OF LIKES & DISLIKES ON TWITTER

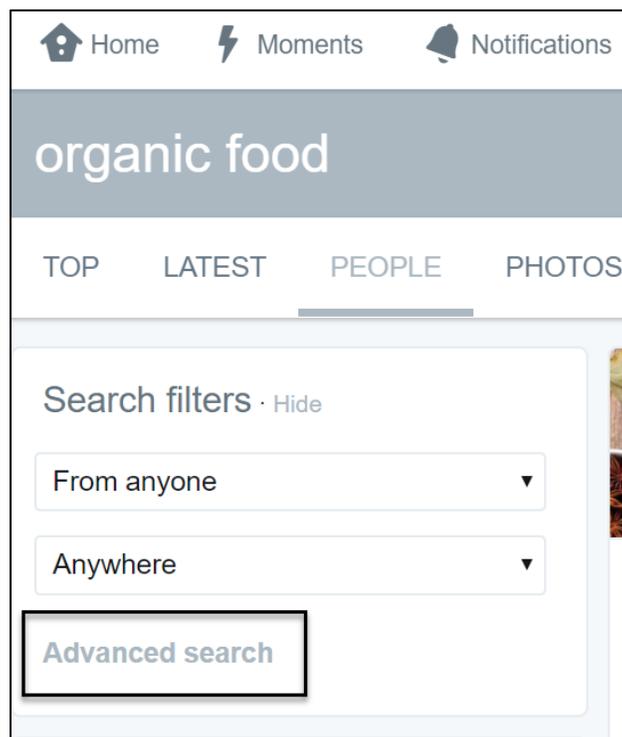
Now that you understand the basics of how Twitter works, it's time to research whether your customers are on Twitter and identify competitors in your industry who are on Twitter and/or successful businesses on Twitter to make an inventory of your likes and dislikes.

### Find Accounts on Twitter

Stay signed into your Twitter account. There are several ways to find accounts to follow on Twitter:

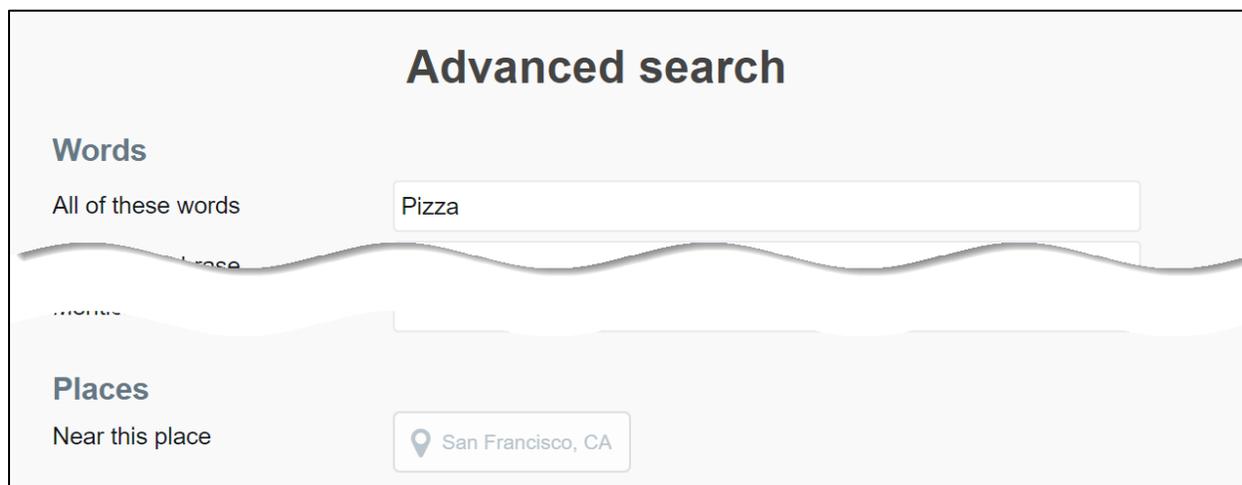
- **Visit their Websites.** Most big brands will have a prominent link to Twitter, right on their Website. For example, go to <http://www.rei.com/> or <http://www.wholefoods.com/>, find the Twitter link, click on it, and hit follow. Go to your competitor websites and do the same.
- **Search on Twitter.** While logged in to your account, go to the top right of the screen and in the “Search Twitter” box, enter the names of competitors, businesses you like, or keywords. To find stuff on Twitter about organic food, just type in “organic food” into the search box. Then, when you find an account you like, just click “follow” and you are now following it.
- **Advanced Search on Twitter.** You can find Twitter Advanced Search by first doing a search, then clicking on “Search filters” on the left, and then “Advanced Search.” Or, just Google “Advanced Search on Twitter” to find it.

Here’s a screenshot:



You can also just visit this link: <https://twitter.com/search-advanced>. One cool feature on Advanced Search is location. Suppose you were a local San Francisco pizza

restaurant, you can use Advanced Search to search for people talking about pizza in San Francisco. Here's a screenshot:



Then, you can tweet to them with a special offer. Remember – Twitter is completely open, so it's very easy to tweet – *Hey! I see you're interested in pizza. Here's a coupon!*

### **Use Google to Find Twitter Accounts**

Outside of Twitter, go to Google and type in *site:twitter.com* and your keywords. For example, on Google, *site:twitter.com "organic food"* will identify Twitter accounts with that keyword. Google is often a better way to find Twitter *accounts*, whereas Twitter search is a better way to browse individual *tweets*. Remember: there is no space between *site:* and *twitter* – it's *site:twitter.com* not *site: twitter.com*. To see this in action, go to <http://jmlinks.com/2j>.

Once you follow companies, you can browse their Twitter pages easily by clicking on the "following" link at the top left of the page while you are logged in to your Twitter account. In this way, you can see who they follow. Here's a screenshot –



You can also see who's following them. In this way, you can:

- Use Google and other tools like LinkedIn or Buzzsumo.com to identify Twitter accounts of key influencers, competitors, journalists, etc.
- Tweet “to” these key influencers with a free offer like your latest eBook or a free product sample.
- Look at who they follow (and tweet to those people).
- Look at who follows them (and tweet to those people).

Even if you won't be using Twitter to directly connect with your customers, you can use this “tweet to anyone” strategy in combination with Google and/or LinkedIn to literally communicate with anyone via Twitter! This feature is unique to Twitter and not to be missed by the savvy marketer.

Returning to company set up issues, your **TODO** here is to identify companies on Twitter, both in and outside of your industry, so that you can inventory what you like and dislike. Here are some inventory questions:

- **Username.** Usernames should be short yet convey the brand. Do you like / dislike the usernames of brands that you see?

- **Profile Picture.** As is true in all social media, the profile picture shows when viewed on someone else’s timeline. Do you like / dislike the profile pictures of various companies on Twitter? Why or why not?
- **Header Photo.** Similar to the Facebook cover photo, this wide banner dominates that account visuals. How are competitors and other businesses using the header photo on Twitter?
- **Pinned Tweets.** Are any brands using the pinned tweet feature? If so, how?
- **Account Bio.** How are brands using their bio to market via Twitter? Do you see any opportunities or pitfalls here?
- **Following and Followers.** Who are they following and who follows them? What does this tell you about their effectiveness on Twitter?

### Posting or Tweeting Strategy

You’ll quickly realize that Twitter offers little customization, and that most of the action on Twitter has to do with *posting strategy* or what would precisely be called *tweeting strategy*. What are businesses tweeting, and why? What is their *posting rhythm*? Similar to all social media, the idea is to spur interactivity, get replies, retweets, and likes, and drive traffic to desired actions such as website visits or visits to your eCommerce store.

Pay attention to companies in your industry as well as hashtags (see below) in your industry, all the while asking the question: are our customers on Twitter? If so, what are they tweeting about? What are they interacting with, and why?

Let’s review some accounts on Twitter and reverse-engineer their posting strategies. Do the same for businesses that you like and/or competitors in your industry.

### Twitter Marketing: Common Uses

Here are common uses of Twitter and example accounts:

- **Celebrities.** Examples are Katy Perry (<https://twitter.com/katyperry>) , Justin Bieber (<https://twitter.com/justinbieber>), Ellen Degeneres (<https://twitter.com/TheEllenShow>).
  - **Marketing Goals:** stay top of mind, get social shares, use Twitter to cross-promote their concerts and TV shows, **posting rhythm** of *fun, fun, fun, fun, buy my concert tickets* etc.
- **Politicians.** Examples are Hillary Clinton (<https://twitter.com/hillaryclinton>), Donald Trump

(<https://twitter.com/potus>), Bill de Blasio  
(<https://twitter.com/billdeblasio>).

- **Marketing Goals:** stay top of mind, get social shares, use Twitter to motivate followers to take political action. **Posting rhythm** of newsworthy, newsworthy, newsworthy, take political action or donate...
- **Political Causes and Non-Profits.** Examples are Greenpeace (<https://twitter.com/greenpeace>), Red Cross (<https://twitter.com/redcross>), Catholic Charities (<https://twitter.com/ccharitiesusa>).
  - **Marketing Goals:** stay top of mind, get social shares, use Twitter followers to take political action or make donations. Posting rhythm is similar to politicians.
- **Brands.** Examples are REI (<https://twitter.com/rei>), Gucci (<https://twitter.com/gucci>), Martha Stewart Living ([https://twitter.com/MS\\_Living](https://twitter.com/MS_Living)).
  - **Marketing Goals:** stay top of mind, get social shares, use Twitter followers to connect to buy actions, also use Twitter as an “insider” or “best customer” channel for secret coupons, inside deals and information. **Posting rhythm** is fun, fun, fun, fun, buy my stuff.
- **Restaurants and Food Trucks.** Examples are Kogi BBQ (<https://twitter.com/kogibbq>), Ricky’s Fish Tacos (<https://twitter.com/rickysfishtacos>), Newark Natural Foods (<https://twitter.com/newarkfoods>).
  - **Marketing Goals.** stay top of mind, get social shares, use Twitter to drive real-world traffic to a store or restaurant, usually looking for insider information or special deals / coupons.

For most for-profit businesses, common marketing goals for Twitter are:

- **Stay top of mind / one touch to many.** To the extent that your users are on Twitter (usually to follow up-to-the-minute news), you can use Twitter to continually remind users about your company, product, and/or service.
- **Insider / loyalty programs.** If you are a brand with a core group of loyal customers (e.g., REI’s loyal group of outdoor fanatics, or Gucci’s loyal group of fashion addicts), you can use Twitter to stay in touch with this elite group and reward them with insider information, tips, special deals, and even coupons.
- **Coupons / bargains.** If you use coupons or discounts, especially in retail, customers commonly scan Twitter for coupons and special deals.
- **Foodies / coupons / bargains / what’s cookin’.** Especially in the food truck industry, but in any big downtown area with a lunch scene, foodies look to Twitter to identify special deals, coupons, and what’s cookin’.

- **On-going Discussions.** By using #hashtags (e.g., #AIDS, #globalwarming, #obamacare), you can participate in an on-going global discussion and thereby market your products. A special case of this is trade shows, which often use a hashtag (#CES for Consumer Electronics Show, for example) to allow participants to converse via Twitter.
- **News Alerts.** To the extent that you generate and/or participate in news, Twitter is the go-to service for breaking news (especially vis hashtags and trending searches).
- **Political Action.** For non-profits and political groups, Twitter is the go-to place to organize politically and discuss politics.
- **Twitter Chats.** You can have a public chat on Twitter, usually using a custom hashtag. In this way, you can engage and interact with your super fans. See SproutSocial’s guide to Twitter chats at <http://jmlinks.com/31q>.

## IDENTIFY COMPANIES WHO DO TWITTER WELL, AND REVERSE ENGINEER THEM

For your first **TODO**, download the **Twitter Research Worksheet**. For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code ‘**2018social**’ to register if you have not already done so), and click on the link to the “Twitter Research Worksheet.” You’ll answer questions as to whether your potential customers are on Twitter, identify brands to follow, and inventory what you like and dislike about their Twitter set up and marketing strategy.

### » BRAINSTORM AND EXECUTE A TWEETING STRATEGY

Optimizing your account on Twitter is pretty straightforward. As indicated above, a good way to do this is to compare / contrast pages that you like and use your inventory list to identify Todos. Next, the real work begins. *What will you tweet? Who will care?* Let’s reverse engineer some companies and their **tweeting strategies**:

**Kogi BBQ** (<https://twitter.com/kogibbq>). Their tweeting strategy is 90% about the location of the taco truck, with a few tweets about “what’s cooking” or “insider specials,” and the occasional back-and-forth with a hard-core Kogi fan about the joys of Korean BBQ. That’s it.

**REI** (<https://twitter.com/rei>). Their tweets are largely off-loads to blog posts, YouTube videos, and Instagram photos about the fun of outdoor activities, some participatory contests for hard-core REI fans, headline links to in-depth blog posts on outdoor fun, and about 10% shameless “buy our stuff isn’t this a cool product” tweets. Like many retailers, REI uses Twitter as a place to communicate deals, insider information, and special offers to its most devoted customers.

**Woot** (<https://twitter.com/woot>). Their tweets are 100% about discounts and bargains, as Woot (owned now by Amazon) is all about discounts and special deals. It’s the home shopping network gone Twitter.

**Greenpeace** (<https://twitter.com/greenpeace>). This non-profit tweets photos that inspire about wildlife and nature, links to blog posts about environmental issues, and political calls to action.

**Cato Institute** (<https://twitter.com/catoinstitute>). This political action organization tweets about politics from a conservative perspective, with offlinks to its blog and videos plus the occasional call to action.

**Zak George** (<https://twitter.com/zakgeorge>). A dog trainer and huge YouTube success, Zak George tweets links to his YouTube videos, some links to his Facebook page, and the occasional tweet about a sponsored product.

**Donald Trump** (<https://twitter.com/realdonaldtrump>). Our “fearless leader” uses Twitter to directly communicate with his most fervent supports, to push back against what he sees as unfair media coverage, and occasionally to showcase positive things being done by his administration. Be sure to leave aside your political opinion of President Trump to reverse engineer how he uses Twitter as a politician / marketer.

Throughout, your job is to reverse engineer competitors or companies you admire in terms of their tweeting strategy. What are they tweeting (blog posts, pictures, infographics, videos), and why are they tweeting it (to stay top of mind, sell stuff, get viewers on YouTube). Who is following them and why? What’s in it for the followers? How does all this tweeting activity lead ultimately to some sort of sale or business action? Summing up, Twitter is used most commonly, to:

- stay top of mind, pestering and reminding customers to “look at me, look at me!”;
- communicate with fans and super fans, people who are already customers and are most passionate about a brand;
- leverage #hashtags to reach a wider audience and participate in society-wide discussions; and/or
- reach out to journalists, bloggers, and other influencers.

**Question.** If you see your customers on Twitter, and if you can brainstorm content that is Twitter-friendly, which of the above are most relevant for your Twitter strategy?

For your second **TODO**, download the **Twitter Tweeting Strategy Worksheet**. For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code ‘**2018social**’ to register if you have not already done so), and click on the link to the “Twitter Tweeting Strategy Worksheet.” You’ll answer questions to help you understand what other companies are doing on Twitter, and begin to outline your own tweeting strategy.

## Content is King

As you work on a tweeting strategy, you’ll quickly realize you need a lot of content! Remember to create a **content marketing system** of:

- **Other people’s content.** Relevant content in your industry. By curating out the garbage and identifying the cool, fun, interesting stuff, you can use other people’s content to help your tweets stay top of mind.
- **Your own content.** Twitter is all about off-loads to blog posts, infographics, images, photos, videos, Memes, and other types of your own content. Twitter and blogging go together like peas and carrots, while Twitter and video go together like scotch and soda.

To identify relevant content from other people, I recommend setting up a Feedly account (<http://www.feedly.com/>) and using tools like Buzzsumo (<http://www.buzzsumo.com>), and Google Alerts (<https://www.google.com/alerts>). Organize these tools into topic groups, and then

as you find content useful to your target audience, “tweet out” that content. Use a tool like Hootsuite (<http://www.hootsuite.com/>) to schedule your tweets in advance.

As for your own content, Twitter is best used by staying on topic and sharing original useful content such as in-depth blog posts, free eBooks or webinars, infographics and instructographics, videos on YouTube. Twitter is a headline service pointing to the “rest of the story” on your blog, video, or infographic.

## » PROMOTE YOUR TWITTER ACCOUNT AND TWEETS

Once you’ve set up your Twitter account, and begun to populate it with tweets on a regular basis, you’ve essentially “set up” your party on Twitter. Now it’s time to send out the invitations.

**In and of itself, a Twitter Page will not be self-promoting! You’ve got to promote it!**

Assuming your Twitter account shares lots of yummy, useful, fun, provocative content that when seen by a user will entice him or her to “follow” you on Twitter, here are some common ways to promote your Twitter account and Tweets:

- **Real World to Social.** Don’t forget the real world! If you are a museum store, for example, be sure that the cashiers recommend to people that they “follow” you on Twitter? *Why? Because they’ll get insider tips, fun do-it-yourself posts, announcements on upcoming museum and museum store events, etc.* Get your staff to promote Twitter in that important face-to-face interaction. If you’re a barbeque truck in Los Angeles, post signs to “follow us on Twitter” on the trucks, and have staff cajole customers to “follow you.” *Why follow you on Twitter? To learn where the taco truck is, to get special deals, and to learn what’s cooking.* Use the real world to promote your Twitter account, and be ready to explain “why” they should follow you on Twitter. What’s in it for them?
- **Cross-Promotion.** Link your website to your Twitter Page, your blog posts to your Twitter Page, your YouTube to your Twitter Page, etc. Notice how big brands like REI do this: one digital property promotes another digital property.
- **Email.** Email your customer list and ask them to follow you on Twitter. Again, you must explain what’s in it for them.

- **Twitter Internal.** Interact with other accounts via the @ sign, share their content, comment on timely topics using #hashtags, and reach out to complementary pages to work with you on co-promotion. (See below).
- **Use Twitter Plugins.** Twitter has numerous plugins that allow you to “embed” your Twitter Page on your website, and thereby nurture cross promotion. To learn more about plugins, visit <http://jmlinks.com/31r>. Among the better ones –
  - **The Tweet Button.** Make it easy for people to tweet your content (e.g., blog posts).
  - **The Follow Button.** Make it easy for Web visitors to follow you on Twitter.
- **Leverage your Fans.** People who like your Twitter Page are your best promoters. Do everything you can to get them to retweet you to their own followers. Remember, it’s *social* (!) media, and encouraging your customers to share your content is the name of the game. You want to leverage your fans as much as possible to share your content.

## DON'T FORGET THE REAL WORLD AS A TWITTER PROMOTION STRATEGY

### Three Special Ways to Promote via Twitter.

Twitter has three very special ways to promote yourself or your company that are much stronger than on other social media.

#### Use #Hashtags to Promote Your Company

The first is the **hashtag**. Because Twitter is all about news, the use of hashtags (designated on Twitter by the “#” or “hash” sign) on trending or controversial topics is bigger on Twitter than on any other social media. Identify trending or important hashtags and include them in your tweets. Use <http://hashtagify.me> to identify hashtags in your industry, and don’t forget about major trade shows which often have (and promote) their own hashtags. Then include these hashtags in your tweets, and make sure that your tweets are not only on topic but also offlink to something useful, provocative or important. In that way, they’ll discover you via a hashtag and then follow you permanently.

**VIDEO.** Watch a video tutorial on how to use the “#” sign or “hashtag” on Twitter for marketing purposes at <http://jmlinks.com/16u>.

## **Industry Trade Shows and Hashtags**

Here's a hashtag use you do not want to miss: industry trade shows. Nearly every industry has THE trade show, or a few KEY trade shows. Nowadays, these will have hashtags, such as #CES2017 for the 2017 Consumer Electronics Show. To see the #CES2017 hashtag in action, visit <http://jmlinks.com/31s>.

Pre-identify the hashtags of your own industry trade show(s) as well as subordinate, session or topic hashtags, and start tweeting on those theme before, during and shortly after the show. Attendees know to look for the show hashtags to find out what's cool, exciting, and worth visiting.

## **Episodic Use of Twitter for Marketing**

For many businesses, simply knowing the hashtag of “the” industry conference and tweeting during the yearly, or twice yearly, trade conference in and of itself will justify using Twitter for marketing:

*Hey #CES2017 attendees! Come by our booth by 2:30 pm for a free laser wand give-away.*

Identify the Twitter account of the industry trade show(s), and they'll easily show you the relevant hashtags. Make sure you have a robust Twitter account set up before the big show, and then during the show start tweeting on show-related hashtags. For many businesses, this “trade show” use of Twitter is the most important marketing use of Twitter.

Here's something *devious*. Identify the hashtags for all your industry shows, including the ones you do *not* attend in the “real world,” and insert them into your tweets during show time. In this way you can tweet “to” attendees of a show without actually being there!

## **@Someonefamous**

The second promotion strategy is what I call **@someonefamous**. The idea here is to reach out and “have a conversation” with someone more famous (with more followers) than you. Think of it like Dr. Phil making it on the Oprah Winfrey show: her audience saw this new “doctor,” and some of her fans became his fans. The trick is to find business partners, complementary companies, or other people / companies on Twitter who are influencers and who have more and/or different fan bases than you.

A useful tool to use is Buzzsumo (<http://www.buzzsumo.com/>). Search for your keywords and identify influencers tweeting about those topics. Identifying them is the easy part. The hard part is getting them to engage in a Twitter conversation with you. You have to convince them to have a conversation with you on Twitter, and then once you’re talking to their fans... convince their fans to follow you, too.

Once you are lucky enough to start a conversation with someone more famous than you, remember to use the “dot” in front of the “@” sign to correctly broadcast your message. To learn more about this, visit <http://jmlinks.com/2k>.

**VIDEO.** Watch a video tutorial on how to use the “@” sign or “handle” on Twitter for marketing purposes at <http://jmlinks.com/16y>.

## **Pitch Journalists via Twitter**

We’ve discussed this already, but you want to think of journalists and bloggers on Twitter as a promotion strategy:

**@journalists.** Identify journalists on Twitter, find their handles, and tweet “to” the journalists, pitching them on story ideas. Journalists love Twitter because it’s where stories break first. They listen to their Twitter feeds as businesses, organizations, and individuals “pitch” them on story ideas via Twitter.

Indeed, you can even advertise to select lists of journalists by using username targeting on Twitter (see below).

## **Get Retweeted**

The third Twitter promotion strategy is the **retweet**. By posting items that are funny, scandalous, interesting, shocking, outrageous or otherwise highly contagious, you get people to retweet your tweets, thereby (again) allowing their followers to see you, and hopefully begin to follow you as well. To research what is retweeted in your industry, simply do a Twitter search with the words RT in front of your keywords. For an example, visit <http://jmlinks.com/2l> to see a search on Twitter of retweets of #organic.

Here's a sample RT:



## Advertise

Besides these three promotion methods, there's paid advertising on Twitter. You can promote your tweets as well as create custom advertising campaigns to promote your account and/or clicks to your website. To learn more about advertising on Twitter visit <http://jmlinks.com/31t> or <https://ads.twitter.com/>. Because journalists and bloggers often follow Twitter intensely for breaking news, one strategy is to make an "influencer list" on influencers on Twitter, and then advertise your tweets directly to those high-impact Twitterers. To learn more about username targeting on Twitter, visit <http://jmlinks.com/1k>.

## » MEASURE YOUR RESULTS

Measuring the success or failure of your Twitter marketing can be a challenge. Let's look at it from the "bottom up" in terms of items a marketer might want to know or measure vis-a-vis Twitter:

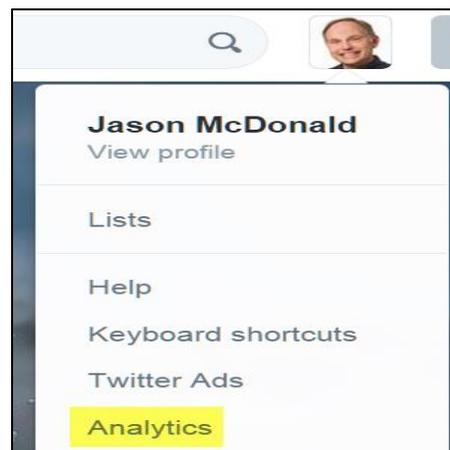
- **Sales or Sales Leads.** Have tweets or Twitter marketing resulted in actual sales leaders (completed feedback forms for a free offer, consultation, eBook, download, etc.) and/or eCommerce sales?
- **Branding / Awareness.** Has Twitter increased our brand awareness and/or improved our brand image?

- **Top of Mind / One Touch to Many.** Has Twitter helped us to stay “top of mind,” by reminding potential customers of our company, products, and/or services?
- **Tweet Interactivity.** Have people read our tweets? Have they interacted with our tweets by favoriting them, and/or retweeted our tweets?
- **Twitter Account.** Is our follower count increasing, and if so, by how much and how fast? Where are our followers physically located, and what are their demographic characteristics?

The last of these is the easiest to measure: simply record your Twitter follower count each month, and keep a record of it month-to-month. I generally do this on my *Keyword Worksheet*, where I also track inbound links to my website, and my review count on review media such as Google+ and Yelp. (Watch a video on a Keyword Worksheet at <http://jmlinks.com/1l>).

### **Analytics Inside of Twitter**

Inside of Twitter, click on your profile picture on the top right of the screen, and then in the pull-down menu, click on Analytics. Here’s a screenshot:



There you can see which tweets gained the most impressions, as well as engagements by Tweet such as clicks, follows, and retweets. Twitter will also tell you whether links you are sharing are getting clicked on and so on and so forth. Twitter also has a feature called **Twitter cards** that bridges your website to/from Twitter activity If you enable Twitter

cards on your Website, you get attribution for your Web content plus more data on that inside of Twitter. Learn more at <http://jmlinks.com/31u>.

## Google Analytics

Most of us want to drive traffic from Twitter to our website, or even better to our ecommerce store or to download a free eBook or software package to get a sales lead. Google Analytics will measure how traffic flows from Twitter to your website, and then what happens upon arrival.

Sign up for Google Analytics (<https://www.google.com/analytics>) and install the required tracking code. Inside of your Google Analytics account on the left column, drill down by clicking on Acquisition > Social > Overview. Then on the right hand side of the screen you'll see a list of Social Networks. Find Twitter on that list, and click on that. Google Analytics will tell you what URLs people clicked to from Twitter to your Website, giving you insights into what types of web content people find attractive.

You can also create a custom Segment to look at only Twitter traffic and its behavior. For information on how to create custom Segments in Google Analytics, go to <http://jmlinks.com/1f>. For the Google help files on Segments go to <http://jmlinks.com/1g>.

In sum, inside of Twitter you can see how people interact with your Twitter account and tweets. Inside of Google Analytics, you can see where they land on your website and what they do after they arrive.

## »» CHECKLIST: TWITTER ACTION ITEMS

Test your knowledge of Twitter! Take the *Twitter marketing quiz* at <http://jmlinks.com/qztw>. Next, here are your Twitter **Action Items**:

- Research** whether your customers (and competitors) are on Twitter. What are they doing? What interests them, and Why?
  - Identify a few **customer profiles** that match your *buyer personas*, and determine how active they are.
  - Identify **companies** to “reverse engineer” who are doing a good job on Twitter.

- ❑ Set up a **Twitter account** (learn the basics like #hashtags, @mentions, and retweets) and begin posting useful content following the 140 character limit and Twitter lingo.
  - ❑ Strategize how to grow / promote your Twitter account, including **advertising** to promote content and grow your followers.
- ❑ Identify, join, and participate in **relevant #hashtags** on Twitter used by your target customers; do not spam!
- ❑ Identify **key influencers** (e.g., journalists or bloggers) and note their @handles. Where appropriate, tweet to these key influencers when you have highly interesting content or free offers such as eBooks, key news, new product samples, etc.
- ❑ **Measure** your **KPIs** on Twitter such as the follower growth, likes, comments and retweets of your tweets as well as traffic from Twitter to your website or eCommerce site.

Check out the **free tools!** Go to my *Social Media Marketing Dashboard > Twitter* for my favorite free tools on Twitter. Just visit **<http://jmlinks.com/smmdash>**.

### »»» **DELIVERABLE: A TWITTER MARKETING PLAN**

Now that we've come to the end of our chapter on Twitter, your **DELIVERABLE** has arrived. Go to **<http://jmlinks.com/workbooks>** (click on *Social Media Workbook 2018*, enter the code '**2018social**' to register if you have not already done so), and click on the link to the "Twitter Marketing Plan." By filling out this plan, you and your team will establish a vision of what you want to achieve via Twitter.





# 6

# INSTAGRAM

Owned by Facebook, Instagram now boasts 800 million active *monthly* users, 500 million active *daily* users, and 95 *million* photos shared per day. Instagram is far and away the #1 photo-sharing social network, albeit one that faces an important challenge from the much smaller newcomer, Snapchat (which has about 150 million active users). But, is Instagram for you? And, if so, how do you use Instagram for marketing? The trick from a marketing perspective is to not only “fish where the fish are,” or rather “share photos where the photo sharers are,” but a) identify and create incredible photo and video content that will engage your customers, and b) devise and execute an Instagram marketing strategy that boosts your brand and ultimately brings you more sales. If a picture is worth a thousand words, and if Instagram is the #1 place to share pictures on the Internet, then it stands to reason you’d better at least download the Instagram app and figure out what all the fuss is about!

In this Chapter, we’ll start with the basics of how to use Instagram, proceed to how to research and identify brands to emulate, and turn to tips, tricks, and techniques to leverage Instagram’s free and paid opportunities. Along the way, we’ll look behind the scenes to “reverse engineer” companies that do Instagram well. By Chapter’s end, you’ll have a good idea as to whether Instagram is just a waste of time for you (*because either your customers aren’t on it in a meaningful way, or because you can’t connect your brand to the fun, family, photos, and fake of Instagram, or both*), or whether Instagram is a social media network that will help you not only photograph, but bring home, the marketing bacon.

**Let’s get started!**

## **TODO LIST:**

- » Explore Concepts and Brands on Instagram
- » Reverse Engineer Instagram Strategies

- » Learn Technical Tips to Using Instagram
- » Inventory Likes and Dislikes on Instagram
- » Compare Instagram to Snapchat
- » Brainstorm and Plan an Instagram Marketing Strategy
- » Promote Your Instagram Account and Posts
- »» Checklist: Instagram Action Items
- »» Deliverable: an Instagram Marketing Plan

## » EXPLORE CONCEPTS AND BRANDS ON INSTAGRAM

Instagram is phone-first, meaning it is an app that really is meant to be enjoyed on the mobile phone. 99.9% of your users will use Instagram on the phone or tablet, and I doubt that many people even know you can access Instagram on the desktop (although you can). So get out your iPhone or Android Device and visit the Apple App Store or Google Play on your phone. Search for “Instagram App” and download and install the app if you haven’t already. For personal use, it’s best to use Instagram on your phone, and as a marketer I recommend that you do so so that you experience Instagram how it’s meant to be experienced, and how most of your users will experience your own brand.

Use Instagram as a user, first, before producing Instagram content as a marketer, second.

It’s probably easier for purposes of marketing research, however, to use Instagram on the desktop. Once you have it installed on your phone with a username and password, just visit <https://www.instagram.com/> and login to your account. You (and your team) can now browse, research, and “reverse engineer” competitors and other brands from your big screen desktop. For purposes of easy explanation, I recommend you visit and follow Koolaid (yes, the tasty beverage you may have enjoyed as a kid) at <http://jmlinks.com/34a> or @koolaid as they say in Instagram-speak. Koolaid is an easy-to-understand, consumer brand on Instagram.

As we walk step-by-step through this business profile, I want you to “drink the Instagram Koolaid” so to speak, and get the hang of looking behind the scenes at what Koolaid (and other brands) are trying to do on Instagram. Instagram is fun! Instagram is a party!

But, calm yourself down, and remember, social media marketing is not just about throwing a fantastic party. It’s about throwing **a party with a purpose**, namely to

bolster your brand equity among your target audience and, ultimately, to sell more stuff (or more Koolaid) as we shall see.

## **The Elements of An Instagram Profile**

Starting on Koolaid’s business profile on Instagram, you’ll see the following elements:

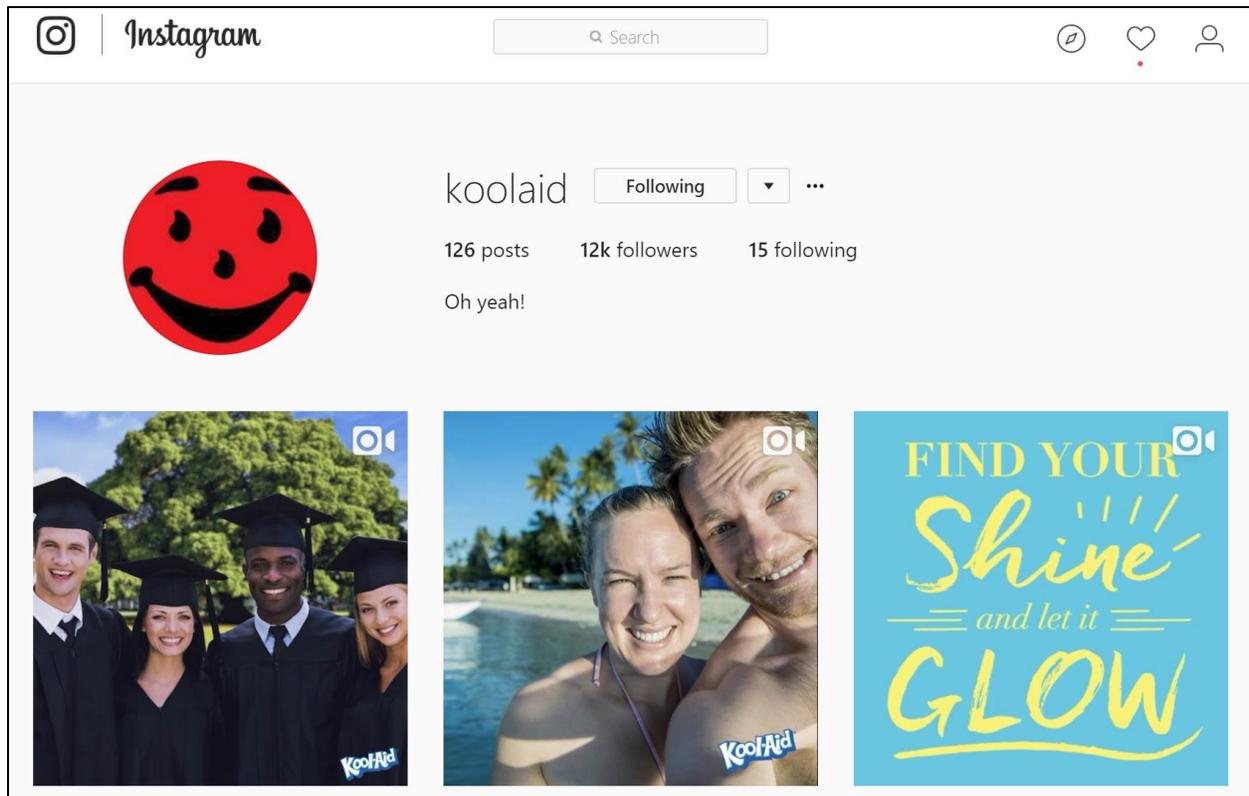
**Profile Picture.** This is the big smiling red icon that represents the Koolaid brand. Notice how it’s a smile, and not a frown, because Instagram (like its parent, Facebook, is all about friends, family, fun, photos, and fake). Everyone is having a good time on Instagram, and if they’re not, they’re supposed to fake it!

**The Timeline.** It may not be officially called a “timeline,” but as on a Facebook business Page, any user can click “up” to the account and see the “timeline,” a series of posts by the brand (or a friend) to his or her timeline. These are represented by square boxes. Note in the top right corner of any Instagram post that there is often a video camera icon (indicating a video post), or if the icon is missing, it’s just a photo. Unlike other networks, Instagram starts with the photo or video; you can’t post something that is text alone.

**Status Stats.** Across the top, you can see whether you are “following” an account, as well as the number of posts, of followers, and of those following. Koolaid has 12,000 followers, 126 posts, and is following 15 accounts. Like Twitter, this is public knowledge; anyone can pretty much instantly see who follows whom, and then follow the followers of a competitor and interact with them to gain their attention.

**The Bio.** Any profile on Instagram, whether that of a person or of a brand, has a bio and the bio is allowed one (*and only one*) **clickable website link**. This is the place to explain your business value proposition (your answer to the question, why follow you on Instagram?) and use the clickable link to get customers from Instagram and to your website, eCommerce store, or other place to take an action such as buy your stuff.

Here's a screenshot of Koolaid's brand page on Instagram:



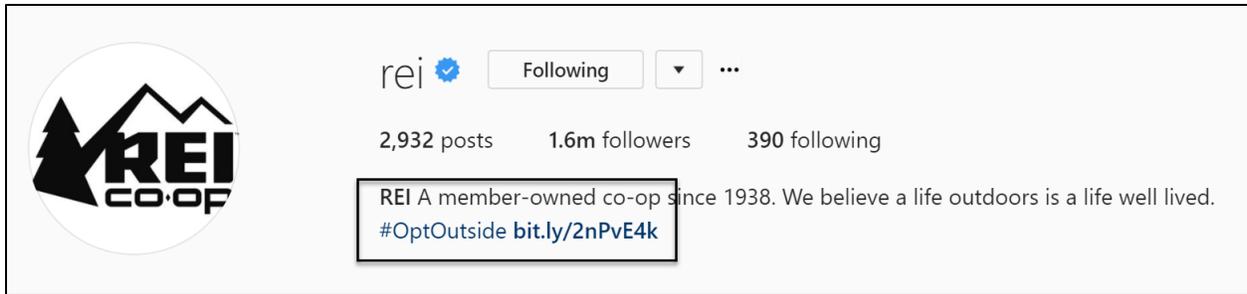
You can see the red smiling Koolaid profile picture, that it has 126 posts, 12,000 followers, and is following 15. Its bio just says “Oh yeah!” The three photos below are its latest posts, and the video camera icon in the top right indicates that all three are videos.

Koolaid isn't taking advantage of all available features for brand pages, however. First and foremost, a brand can create a clickable link in its bio, and this is a big opportunity not to be missed. Second, a brand can include a *hashtag* in its bio (such as a brand-centric hashtag by which its avid super fans can share their own photos and experiences about the brand), and finally a brand can include an email link. Compare Koolaid, for example, with Foundr magazine (<http://jmlinks.com/33x>). Here's a screenshot from my iPhone:



Foundr Magazine has enabled a clickable link to their free giveaway at [foundrmag.com/ecommerceguide](http://foundrmag.com/ecommerceguide), and the blue *Email* link is clickable on the phone. In this way, any follower can quickly jump from Instagram to the desired action (which, in this case, is to give them your email in exchange for their eBook), or click on *Email* to send an email to **marketing@foundrmag.com**.

Now compare Foundr to REI (<http://jmlinks.com/32u>) and you'll see that REI (the sports coop) has created a nifty *hashtag* called *#OptOutside*. Here's a screenshot:



I've outline the hashtag as well as the clickable *bit.ly* link. If you click on the hashtag on your phone, or on the desktop, you can dive into the “conversation” on Instagram about REI. Check it out at <http://jmlinks.com/27j>. If you browse that hashtag you'll see user photo after user photo on REI's theme, indicating that REI is a brand that clearly “gets” Instagram and has leveraged fun, friendly user generated content (UGC) to support its Internet marketing efforts.

As with all social networks, look at competitors and big brands through the prism not only of a user but of a social media marketer. What do you like? What do you dislike? What features are enabled, such as the clickable Email link on Foundr Magazine, and which brands have enabled which features such as hashtags or eCommerce integration? Take this knowledge back to your own Instagram account, and enable what you like, and disable what you don't.

### **The Elements of an Instagram Post**

Returning to @Koolaid, let's take a look at the elements of an Instagram post. Here's a screenshot of a recent photo post:



Here are the elements:

**The Photo (Or Video).** This is, of course, is the primary element on Instagram. This is a photo you upload from your camera or take directly with the Instagram app. You can edit it in Instagram (or use third party apps), put on filters, etc., but ultimately it's just a photo (yes, a photo that you have done so incredibly artistically and amazingly well that it “goes viral” and gets your users so excited that they like, comment, and share your post to other – but structurally and conceptually, it's just a photo or a video).

**The Caption.** This is what the user inputs about the photo. Koolaid's is “Nothing's more American than the beach, and Kool-aid Man. Post a pic using #AmericanSelfie and your post might be used during the @Macys 4<sup>th</sup> of July Fireworks celebration.” (Notice the use of hashtags and the “@” sign to indicate Instagram handles on Instagram posts just as on Twitter. Both are clickable in a post).

**The Comments.** Users can comment on a post, and you can see those here. Many of them include their own #hashtags or @handles as well.

**The Likes.** Symbolized by the “heart” sign on Instagram, these “likes” function just like a “like” on a Facebook post, indicating that the user “likes” it, or “endorses” it.

**Other Elements.** On the phone, one can click on the heart icon, the comment icon (to make a comment) as well as a little paper airplane icon (to “send” it to one’s friends akin to a “share” on Facebook or Twitter), and a “bookmark” icon to save it to a collection.

**Clickable Action.** This occurs only on paid advertising posts. Normally, a post to Instagram cannot have a clickable item (so most organic posts will say something like “click on the link in my bio for more info”). But advertising posts, can and do have clickable links. As you browse Instagram on your phone, pay attention to the ads and you’ll see blue buttons / clickable actions.

## **Instagram Stories**

In competition with Snapchat, Instagram has introduced *Instagram stories*. These are short narrative video clips that tell your story on a day-to-day basis. If someone you are following has a story, their Profile Picture will glow on the phone with a pinkish / red circle around it. (Note: this feature only works on the phone, and not on the desktop). Simply click on their icon, and then you can watch a short video of that person’s (or brand’s) Instagram story. To learn more about Instagram Stories, read the help file at <http://jmlinks.com/27n>.

Looking to the future, you can easily see the marketing opportunity for a business to post a fun, provocative “insider” story to Instagram, so that your most avid customers can get insider information and fun insights about your business. Imagine a pizza restaurant posting an Instagram story of “how we make our incredible pepperoni pizza,” or a fashion designer sharing his daily shaving and man-beauty routine. “Insider stories” are what brand stories are ultimately about on Instagram.

## **The Instagram Game: Followers, Likes, and Engagement**

As on other social media networks, the game on Instagram is to get people to follow you, and once they follow you, get them to like, comment, and share (“send”) your posts to their friends, family, and contacts. Interactivity is where it’s at on Instagram, so you need to brainstorm fun, provocative photo or video content that engages your users.

# LIKE ALL SOCIAL MEDIA, INSTAGRAM CRAVES INTERACTIVITY

Instagram, like Facebook or Twitter, follows the structure of timeline and newsfeed. What a friend posts to her timeline shows up in my newsfeed. If she posts a photo of herself and her boyfriend having fun at Disneyland, then that photo will show up in my newsfeed, where I can “like,” “comment,” or “share” it to my own friends. In this way, Instagram is very much *Twitter with pictures*.

Users have profiles, and post pictures / videos to their timelines. They can also post Instagram stories, which are collections of photos and videos.

The videos / pictures posted by User A appear in User B’s newsfeed if they’re connected to each other. (Instagram, like Facebook, also monitors interaction in a quasi-Edgerank fashion, ranking which posts are prominent on the newsfeed as measured by previous interaction among the parties. The more interactive you and your account are, the more likely it is that your followers will see your posts prominently in the newsfeed.)

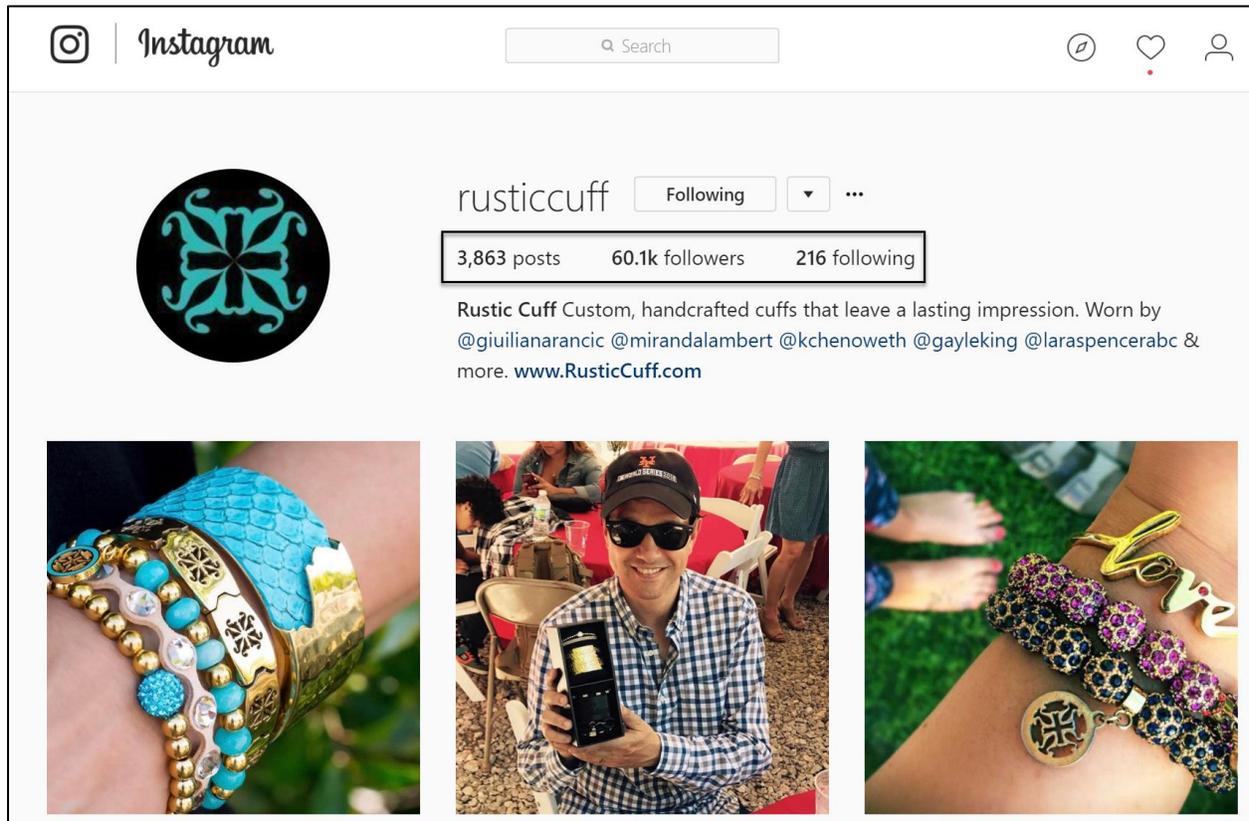
Businesses can have brand Pages on Instagram, and when an individual follows a brand (similar to liking the brand’s Facebook Page), posts by that brand will appear in the newsfeed of followers if the posts are “engaging” enough as judged by the Instagram algorithm.

Users can like, comment, or share posts by others to their own followers. (Note: Instagram doesn’t have a blanket “share” feature like Facebook or Twitter, but rather handles shares on a more one-to-one basis via the “send” feature.).

## **Instagram is Open**

Despite being owned by Facebook, Instagram is more like Twitter in that it’s very **open**. Anyone can quickly set up an account, and a business profile exists independently, not needing to be “sponsored” by a personal profile. Most of the information is public on an account, unless that account user changes the default settings to make things private. This actually makes Instagram really great for brands to be discovered by new users, and it makes it very easy for you to snoop on your competition’s Instagram strategy.

Rusticcuff, for example, is one of my favorite Tulsa brands, selling incredible, funky, stylish bracelets for women. You can see their Instagram page at <http://jmlinks.com/32t>. Here's a screenshot:



On the phone or on the desktop, you can easily click on their followers, and then “follow” their followers. Even better, you can interact with those followers (hopefully in a meaningful way). Like Twitter, therefore, you should look at Instagram as a very public social media network – anything you do, or a competitor does, is nearly 100% public.

### **Business Profiles and Personal Profiles**

While there's not a clear distinction in terms of how they work between business profiles and personal profiles on Instagram, it's best to correctly choose a Business Profile for your business. (Note: just to confuse us, it's called a Business *Page* on Facebook and a Business *Profile* on Instagram).

A Business Profile allows for advertising and also provides reporting. To set up an Instagram account for a business from scratch, however, you must first have a Facebook Page for your business. (To learn how to set up a Facebook Page for your business, visit <http://jmlinks.com/29a>). So, first set up a Business Page on Facebook, and then open up the Instagram App to set up a new Instagram Business Profile.

Note: to set up a business profile on Instagram, you'll have to do this first on your phone by "signing out" as an individual. You can read the official step-by-step guide to setting up a business profile on Instagram at <http://jmlinks.com/28x>. Follow the steps to create a new Business Profile on Instagram.

### **Converting a Personal to a Business Profile**

You can also convert an existing Personal Profile to a Business Profile, if you mistakenly set up your Business Profile as a Personal Profile. (And you can convert back again). However, because a Business Profile on Instagram must be connected to a Business Profile on Facebook, again first be sure that you have first set up a Business Profile on Facebook, then follow these steps:

1. On your phone, open the Instagram app, go to your profile and tap the gear icon.
2. Tap Switch to Business Profile.
3. Connect to your Facebook Page.
4. On the Set Up your Business Profile page, review your business contact information and press done.

A Business Profile is recommended as it allows a Contact button near the top of your profile, where people can see options like *Get Directions*, *Call*, and *Email*, depending on the contact information you provided. You also get better metrics for a Business Profile. To read the help file, visit <http://jmlinks.com/27k>.

### **Managing Multiple Accounts**

Fortunately, once you have both a personal Instagram and a business Instagram, you can manage both via one app on your phone. Go to the gear icon, and then scroll down to the very bottom and find "Add Accounts." To read the help file on how to set this up, visit <http://jmlinks.com/27m>. You can manage up to five accounts on Instagram via one phone and one app install.

## » REVERSE ENGINEER INSTAGRAM STRATEGIES

We'll return to some of the technical features of Instagram in a moment, but let's look at what's going on on Instagram first. Like any social media network, you want to figure out what people are doing on Instagram, and what brands are trying to do as marketers as well. Like any good party planner, you want to figure out if your target customers are on Instagram, what they're engaged in, and then turn a skeptical eye towards what other companies and brands are doing to "reverse engineer" their marketing strategies.

First up, ponder for a moment what you, your friends, and family are doing on Instagram, leaving aside companies and brands for the moment. If I take a look at myself as well as my friends and family on Instagram, it's pretty clear that 99% of what people are doing on the network is paying attention to friends and family as they have fun in their daily lives, and taking photos (and videos), along with posting these to their Instagram Stories. At its core, Instagram is really just a multiperson scrap book sharing photos and videos largely of the "fun stuff" in one's life. Is it fake? Absolutely. Like Facebook, Instagram is more "life as it should be" than "life as it really is."

### **Search by Location**

One good way to see what "real people" are doing on Instagram is to search by location.

Simply go to Instagram and type in a city, such as Pittsburgh, Tulsa, or Houston. To browse Instagram posts on Tulsa, for example, visit <http://jmlinks.com/27p>. Then drill down into a post, and you can snoop into what that person was posting, and how their family, friends, and acquaintances reacted. For example, here's an adorable Dad and son post, on Judah and his daddy:



You can then click “up” to the person who posted it, in this case *@hargtracey* and see what she’s posting to her account. (Note how, like Twitter, Instagram is very open – many people have little idea just how public what they do on Instagram is to the outside world). On a personal level, you’ll quickly realize that 99% of Instagram posts (like those on Facebook) are friends, family, and fun. Life on Instagram (like life on Facebook) is often a romanticized, idealistic view of what life should be like, rather than how life really is. Accordingly, your business brand should play into the themes of Instagram, especially the themes of friends, family, and fun. Obviously, you need to get adept at creating quality photos and videos, too.

### **Business Strategies on Instagram.**

With some basics under our belt, let’s turn to what brands are doing on Instagram. Remember – unlike a person – a brand isn’t on Instagram “for fun.” Rather, whether it’s the camping gear retailer, REI, the Mexican airline, Aeromexico, or one of my favorite’s,

Tulsa's own Rusticcuff (which makes and sells trendy bracelets for fashionistas), brands have an ultimate **goal** for Instagram: **to sell more stuff**.

If you work backwards from the “ultimate goal” of selling more stuff, you can see that many brands are on Instagram to build “brand equity,” that warm and fuzzy feeling that tells you when it's time to book a trip to Mexico, you want to fly Aeromexico airlines, when it's time to go camping, you want to shop for a tent via REI, and when it's time to buy a gift for mom or your girlfriend, a trendy bracelet from Rusticcuff is a good gift to buy online. Oh, and when it's time to vote for President, @realdonaldtrump might be a good place to “make America great again.” (Or not, depending on your politics.).

Politicians and news organizations are also big on Instagram!

### **Consumer Brands on Instagram**

By far the biggest and most active business accounts on Instagram could be categorized as consumer brands. Take a brand like REI (@REI), for example. (You can browse it on your desktop at <http://jmlinks.com/32u>). REI posts photos of cool people doing cool things outdoors, with its clothing, gear, and accessories taking a backseat to just people having a great time enjoying nature. It's pretty easy to see that REI's Instagram marketing strategy is to share fun photos of its customers wearing or using REI gear, and to encourage “user generated content” from customers by having contests and using hashtags like #optoutside (<http://jmlinks.com/27q>). As you scroll through REI's account, you can hover to see the number of “likes” and “comments” as indicated by the heart icon and the comment icon, respectively. Because REI does a great job with its photos, videos, and strategy and because outdoor fun is a photogenic fit to Instagram, it's easy to see that Instagram is a huge and successful part of REI's Internet marketing efforts.

## REVERSE ENGINEER THE BIG BRANDS ON INSTAGRAM

Or take a brand like Whole Foods (@wholefoods at <http://jmlinks.com/32v>), another big retailer, but this time of food. Whole Foods shares fun, colorful photos of healthy, organic foods (which, incidentally you can buy at its many stores...), as well as uses

hashtags like *#Foods4Thought* and *#WholeFoodFaves*. Even more interesting, notice that Whole Foods uses the Instagram shopping service Like2b.uy at <http://like2b.uy> (<http://jmlinks.com/32w>) to integrate its Instagram posts with its blog and website. Here's a screenshot:



If you click on the Like2b.uy link, you'll see photos that “match up” to Whole Food's Instagram posts and you can go from there to the Whole Foods website, blog, eCommerce site, etc.

Like2b.uy is a workaround against the fact that Instagram allows one, and only one, clickable URL in an account in the bio. Another vendor that uses this type of integration is Airbnb (<http://jmlinks.com/32x>), which says “Book from our feed” in its Bio, linking to <http://abnb.co/xw81DW> (<http://jmlinks.com/32y>) which is part of Olapic's Tap-shop platform at <http://jmlinks.com/32z>. Check my companion *Social Media Marketing Toolbook* for a complete index to the best Instagram resources, including eCommerce plugins and services.

Consumer brands, in summary, are big on Instagram. For your first **TODO**, look deep into your consumer soul and identify some fun consumer brands that you personally like. Find and follow them on Instagram. What you'll see is brands leveraging photogenic product shots as well as photogenic shots of happy customers using their products and services. The truly great marketers on Instagram, like REI, have figured out how to mobilize their customer evangelists to post, like, comment, and share product photos for them.

## Tap into the Narcissism of Your Customers

There's a certain self-serving narcissism in our modern, ego-centric culture in which you post your “amazing” trip to Machu Pichu (744,642 posts as of May, 2017 at <http://jmlinks.com/27r>), your “incredible” trip to Disney World (5.7 million posts at <http://jmlinks.com/27s>), or your meaningful Destination Wedding (1.9 million posts

at <http://jmlinks.com/27t>). The point is that if it's "fun" and it's "photogenic," and especially if people want to "show off" to their friends and family about how much "fun" they're having... it's a perfect fit for Instagram marketing! As a brand, if you can tap into our very human desire to "show off" to our friends how cool, fun, brilliant, smart, incredible, holier-than-thou, moralistic, compassionate, perfect, rich, with it, living-the-life, and any other narcissistic impulse that we share as humans... well, that's the way to market successfully on Instagram.

Note also that geographies like Tulsa, Oklahoma, (<http://jmlinks.com/33a>), Niles, California, (<http://jmlinks.com/33b>), or Havana, Cuba, (<http://jmlinks.com/33c>) also have hashtags or technically what are called "location tags." You can even create a location, such as your business address and then promote it to customers for location-tagging. See <http://jmlinks.com/33d>.

## INSTAGRAM TAPS INTO OUR HUMAN DESIRE TO "SHOW OFF"

Airbnb (<http://jmlinks.com/32x>), for example, is a brand that truly does Instagram well, and taps into this "show off" component of the human ego. Who doesn't want to share photos of their fun Airbnb vacation for a little surreptitious gloating vis-à-vis their friends back home, stuck in cubicle hell at work? REI also fits this mold as people "show off" their incredible communions with nature, using REI products. For a small business, an example of this affinity would be a wedding planner, wedding photographer, or pretty much anything in the wedding industry. Just search Instagram for the hashtag *#wedding* and you'll find over 80 million posts sharing the fun, faith, and love that is that glorious day (*plus products and services to buy at a convenient wedding superstore near you, act now supplies are limited*). Brainstorm how and why your customers might want to "show off" that they are using your products in a photographic / video way, and you're on the way to real Instagram marketing success.

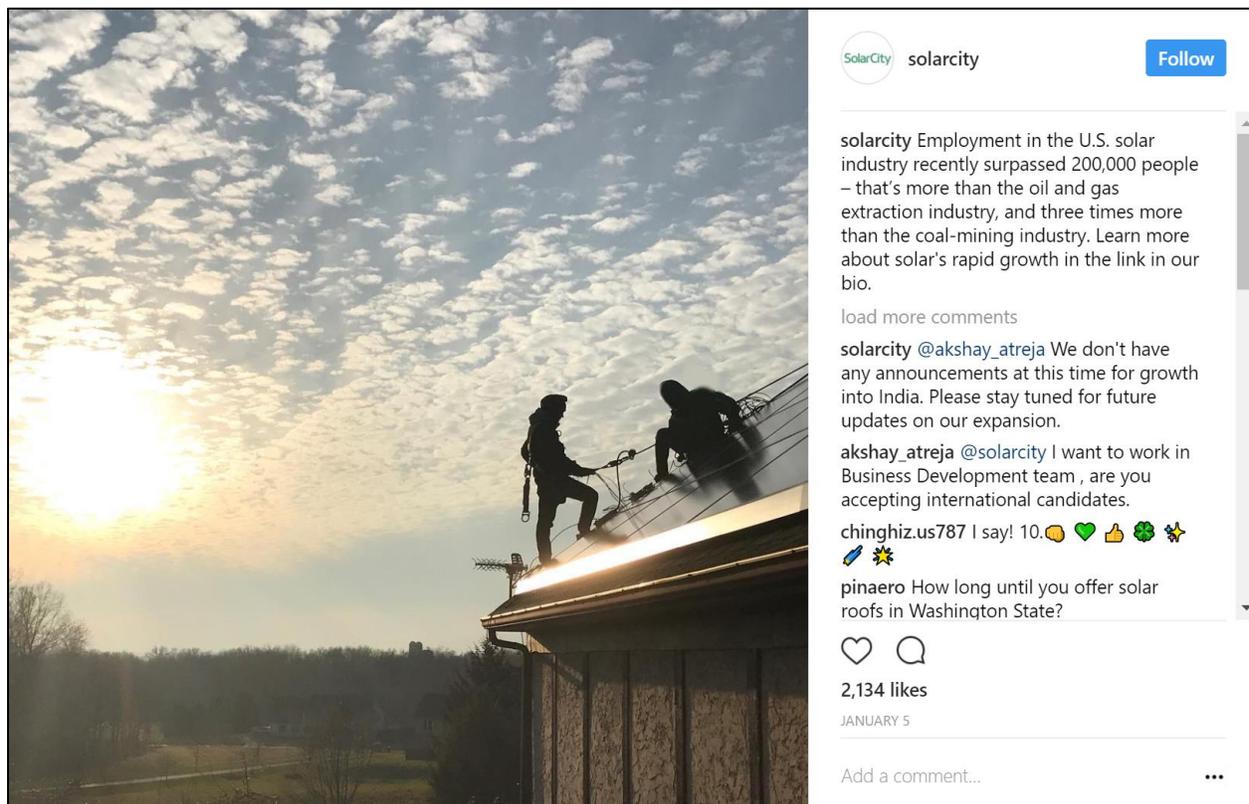
### **Non-fun Brands that Hook Up to Something Fun**

If your brand isn't fun, don't despair. You can hook up to something that is truly fun. Take air travel. Let's face it, air travel isn't exactly fun these days. Unlike camping or staying in a fabulous Airbnb location, air travel in and of itself is anything but fun. And it's not very

photogenic. What would people take photos of besides the planes? I mean, should you have your customers photograph the crowded and dirty seats, the overhead bins, or those crazy, blue and loud toilets?

An airline, therefore, has to “look out the window” to find things that truly are fun (such as travel), and connect these *fun* things to the *non-fun* experience that is air travel.

Check out United Airlines at @united on Instagram (<http://jmlinks.com/33e>), or for an airline that does tend to be a bit more fun, I recommend Aeromexico at <http://jmlinks.com/33f>. The point is if your brand is, serious or not-fun, brainstorm ways that you can attach it to more fun types of activities, especially ones that are photogenic. This strategy is at the heart of all the airlines on Instagram. But it goes for B2B or more serious consumer brands as well. Consider SolarCity at <http://jmlinks.com/33g>. That brand posts photos of solar panels, as well as outdoor nature-type photos that highlight the synergy between clean energy and a healthful outdoor environment. Here’s a screenshot:



Solar panels in and of themselves are neither fun nor photogenic.

## Really Unfun Products or Services: What to do?

Next, take a look at the big insurers like Geico (<http://jmlinks.com/33h>), Allstate (<http://jmlinks.com/33j>), or Progressive (<http://jmlinks.com/33k>). Insurance is not only “not fun,” it’s one of the most expensive, mistrusted and obnoxious experiences of a consumer’s life. *(The policies can be next to impossible to understand, and as my Dad says, the insurers are great at taking your premiums but not so great at paying out when something happens. Regardless of my views on insurance, as an Instagram user, I’m not exactly going to share a photo of me on Instagram going over my life insurance policy!).*

Insurance is boring, unphotogenic, mistrusted, and not exactly something the average consumer would spontaneously share on Instagram. So, what is to be done?

Like the airlines, the insurance companies attempt to attach themselves to something fun and photogenic. Their job is much more difficult, because while Aeromexico takes you to Cabo or Puerto Vallarta which are fun and photogenic, you probably won’t exactly take a picture of your house burning down and caption it, “Wow! I’m glad I have Allstate.” I also doubt I’m going to take photo of myself in my coffin, and say, “Wow! I’m glad I have USAA life insurance!” (Though perhaps my wife will take a selfie with me, *#itsfinallyover*).

Accordingly, the insurance companies are worth looking at on Instagram as examples of “out of the box” marketing thinking. An example would be Progressive’s hashtag *#parentamorphosis*, which attempts to make fun of the transformation from a hip twenty something into a boring thirtysomething with two kids in tow.

Here’s a screenshot:



This post garnered 128 likes, which is far from tremendous, but it shows the strategy attempt by one of the country's biggest brands to attach the non-photogenic, non-fun themes of insurance to the fun, photogenic themes of Instagram.

### Gurus and Visual Instruction

If you, or your small business, can explain things to people and if those things can be explained in such a way as to be visually appealing, then an Instagram guru strategy might work. Consider the fitness industry, for example, which posts photos and short videos to Instagram to teach users how to get fit (and occasionally promotes products and services to buy). Check out Certified Fitness, for example, at <http://jmlinks.com/33m> with 8400 followers and 3200 posts as of May, 2017. Inspirational posts are mixed with instructional videos to build a brand that promotes fitness. Or for a bigger brand, check out 24hourfitness at <http://jmlinks.com/33n>. Or check out the 14 million posts to the hashtag #fishing and 6 million to #hunting. These are visual sports or activities that blend a “Gee! Look at the huge fish I caught” narcissism of the users with the visual “how tos” of vendors and a good dose of selling and brand identity.

Even outside of the purely visual, brands that explain things can find a niche on Instagram. Sue B. Zimmerman is one of the goddesses of Instagram, and she shares tips, tricks, and pretty much the visual story of her life at <http://jmlinks.com/33p>. Dog guru Zak George uses Instagram to share photos of dogs and dog-training tips at <http://jmlinks.com/33q>, as does the much more successful (at least on Instagram), Cesar Millan (<http://jmlinks.com/33r>). All of these “guru strategies” blend insider tips, tricks, and secrets with a personalized view into the life and viewpoints of the guru him or herself.

## News and Entertainment

Finally, like Twitter, Instagram has found a place in news and entertainment. Big time politicians like President Trump use Instagram to showcase a visual magazine of their day-to-day events and achievements. Like him or hate him, don't ignore him: check out Donald Trump on Instagram at <http://jmlinks.com/33s>. Notice how he uses his bio to pitch the reason why you should follow him:

Join me here on Instagram for #TeamTrumpBTS {exclusive behind the scenes} & so much more! #MAGAUS

And notice the use of specific hashtags such as *#TeamTrumpBTS* (<http://jmlinks.com/27y>) to help his fans and followers coalesce with their own user generated content to help Team Trump. Notice as well by checking out that hashtag that, well, Instagram, like Twitter, is not totally under the control of Team Trump, so in politics as in everything on social media, be careful with hashtags! People who hate you can also chime in, and boy will they!

But back to news and entertainment, any brand that is visual and news-oriented can do well on Instagram. Consider Nasa at <http://jmlinks.com/33t> with 23 million followers or Al Jazeera English at <http://jmlinks.com/33u> with 615 thousand. Any news organization, political candidate, or political cause that can connect its message to the visual centrality of Instagram can succeed. Even the Vatican is online at <http://jmlinks.com/33v>!

## Which Strategy Fits You Best?

The strategic point of all these examples on Instagram is to get you to look deep into your marketing soul, and ponder whether:

You're a **fun brand**, in a **fun, photogenic industry** such as travel, so Instagram is a natural and easy fit for your online marketing. (Example: @Airbnb, @Disney).

Or

You're a **non-fun brand** adjacent to a **fun photogenic** industry such as airlines, so Instagram fits only if you attach your “non fun” brand (air travel) to the photogenic outcome, *travel*.

Or

You're a **non-fun brand** in a **non-fun, non-photogenic industry** such as insurance, so Instagram only works if you attach your non-fun brand to something fun (hence the attempts by @Progressive to make insurance fun, or post things that have little to do with insurance but somehow connect to insurance).

This is even true for nonprofits, which should also identify if they are *fun* or *not fun*, *photogenic* or *non-photogenic* for the purposes of their strategy. Your **TODO** here is to determine where you fit:

**Fun and photogenic:** use direct photos of the product or service, and encourage user engagement around the direct use of the product or service (*e.g., Disneyland encouraging users to share photos of themselves having fun at Disneyland*).

**Not fun but adjacent to something fun and photogenic.** Use photos of the “result” of the product or service in something that is fun and photogenic (*e.g., encouraging persons who tan in tanning booths to share photos of their sexy, tanned bodies at the beach; check out #tanning on Instagram. Another example is how airlines (not fun) use travel (fun) to promote themselves on Instagram (@SouthWestAir)*).

**Not-fun and non-photogenic:** attach your Instagram marketing to an adjacent or even unrelated theme. An example would be @Progressive on Instagram, sharing photos of their employees enjoying summer at Progressive

Field Ballpark in Cleveland. *Baseball is fun, the ballpark is fun, and so... insurance is fun...*

## Sentimentality and Aw Shucks on Instagram

Another common strategy is to use quotes and emotion-inspiring photos to attach your brand to something that people will “agree with” because it has a strong emotional component. One of my favorite examples of this is @Islamic\_Teachings (<http://jmlinks.com/33w>) which shares meaningful quotes about Islam.



So something serious, *religion*, is connected to something beautiful, *a bird*, with a quotation that provides *food for thought*. This post received 18,994 likes. Foundr magazine uses this type of quote strategy as well at <http://jmlinks.com/33x>.

We'll return to researching and “reverse engineering” brands on Instagram in a moment, but let's dive back into tips and tricks to better manage your Instagram efforts.

## » LEARN TECHNICAL TIPS TO USING INSTAGRAM

We'll assume that you've set up a business profile on Instagram, and done the basics of adding a profile picture, filling out your bio, including a link to your website or eCommerce store. It's a best practice, especially for larger, more consumer-focused brands, to create a company-centric hashtag, so that your fans have a virtual way to "tag" their posts about your product or service. Airbnb does this, for example, simply with the hashtag *#Airbnb*, and SouthWest Airlines does it with *#SWApic* to encourage its customers to tag photos about their SouthWest trips.

### Learn a Little Photography

Before we dive into technical tips on Instagram, let's take moment and talk about **photography**. Instagram is all about photos and videos, so it's very worth your while to become a better photographer. You can Google "how to take better iPhone photos" for example, or go to YouTube and look for photo tutorials. To read a nice, short article on how to take better Instagram photos, visit <http://jmlinks.com/28y> and <http://jmlinks.com/28z>. But spend some time simply learning how to identify photo-friendly subjects, and how to optimize your photos on your camera. The subject and quality of the photos matter a lot.

### Use Instagram Hacks and Techniques

Now, let's dive into some of the technical tips to being a better Instagram user:

**Use Hashtags.** As has already been discussed, hashtags are big on Instagram! In fact, hashtags are more important on Instagram than on Twitter, and a post can often have five, seven or even ten hashtags at the end of it. Use a tool like Hashtagify.me (<http://jmlinks.com/27v>) or Hashtags.org (<http://jmlinks.com/27w>) to identify customer-friendly hashtags for your account bio and posts. Also, just search Instagram by your keywords to identify hashtags that have a lot of volume.

**Tag People.** As on Facebook you can "tag" people, and thereby notify them that they were included on your feed. So, for example, if customer Jane Doe follows your Pizza Parlor, then you can take a picture of her and her friends on her birthday, and tag all of them in the Instagram app. In that way, they all get notified that they were "tagged" and are encouraged to share the post with their own friends via Instagram.

**Shopping / eCommerce.** Instagram does not allow clickable URLs in posts. Therefore, third party services have emerged such as Ola Pic Tap Shop (<http://jmlinks.com/32z>) or Like2Buy (<http://jmlinks.com/32w>) that can cross-connect your account to photos that match up with your posts.

**Link in My Profile.** This phrase is commonly used in a post on Instagram to remind people, “Hey! If you want to buy this, or check it out on my blog, the clickable link is in my profile” or “Link in my bio” is another way people reference this idea.

**Add Locations.** This is a unique feature to Instagram. When you upload a photo, you can “tag” it to a location such as San Diego or Miami. This improves your chances of showing up in the *Instagram Explore* feature (See: <http://jmlinks.com/27z>), which is where people can go to explore what’s up with their friends, connections, and other algorithmically generated accounts and posts. Think of Instagram as an online magazine, and this helps you get into their flippable newsfeed, so to speak.

**Multiple Image Posts.** Instagram now allows more than one photo per post. Some people hate this feature, but others like it. The easiest way to use it is to access your camera roll, and click on “select multiple” to select multiple photos.

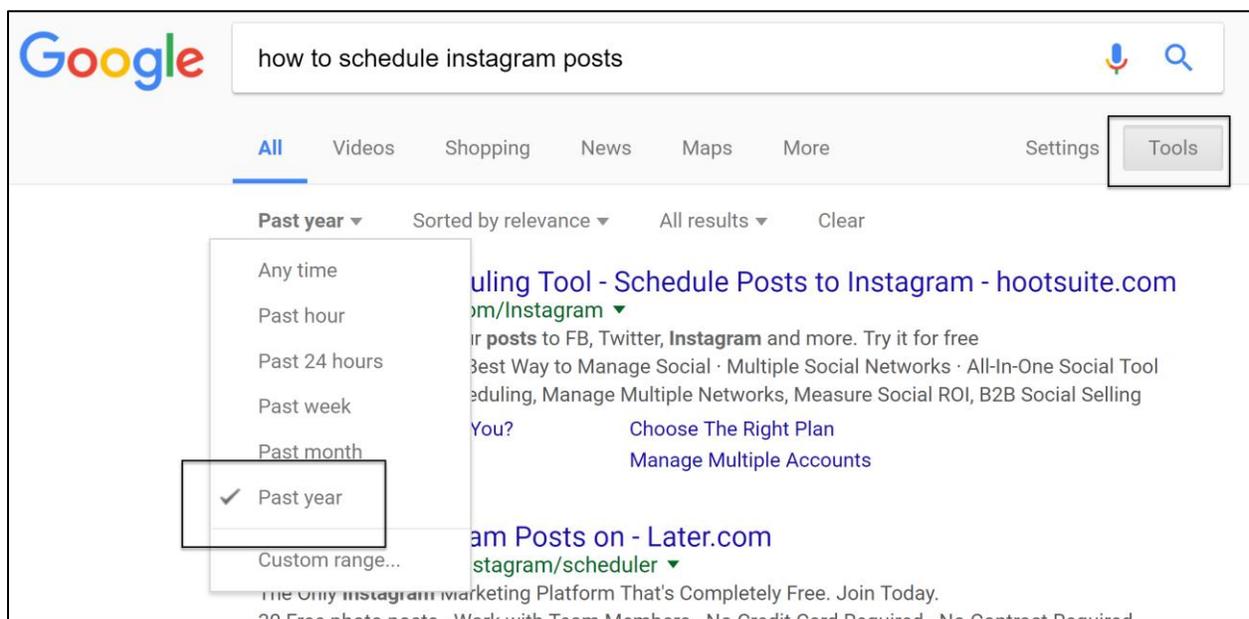
**Boomerang.** This is a quick video plug in for Instagram. Simply find it in the Apple Store or on Google Play by searching for *Instagram Boomerang*. This fun app allows you to shoot a quick, looping video and upload it to your Instagram account. Learn more at <http://jmlinks.com/27x>.

**Manage Multiple Accounts.** Once you’ve set up your own personal Instagram account and that of your company, how can you manage them? Within Instagram, go to settings (Gear icon on the iPhone), and then scroll to the bottom to “add account.” You can also use a third party desktop app like Hootsuite or Buffer to manage multiple business accounts, including posting from the desktop and scheduling out your posts.

**Instagram Help.** Yes, Virginia, there is help on Instagram! Simply visit <http://jmlinks.com/33y>. You can search by keyword for help on a variety of topics. Instagram for business focuses more on advertising issues but can be found at <http://jmlinks.com/33z>.

## Formulate a Question, and Find the Answer

Remember that *once you know the question, you can find the answer*. One of the best ways to do this is to simply “Google” your question. Just go to Google and type in something like, “How to schedule Instagram posts,” or “how to manage multiple accounts on Instagram,” and you can usually find a quick blog post or YouTube video that will answer your query. “Once you know the question,” I always say to my Stanford students, “You can find the answer.” So spend some time reverse engineering what users and competitors are doing on Instagram, and then formulate a question for Google along the lines of “how do they do such-and-such.” A good tip here is to use the Tools menu on the far right of Google and select Past Year so as to get recent, up-to-date answers. Here’s a screenshot:



## » INVENTORY LIKES AND DISLIKES ON INSTAGRAM

Now that you have the basics of Instagram down, as a user, and you’ve taken a look at some of the big brands like REI, Airbnb, or Aeromexico that are doing Instagram well, it’s time to do your own inventory as a company. Your goal is to identify companies that are doing Instagram well, and “reverse engineer” what you like or dislike about their Instagram marketing strategy. Remember: you don’t only want to find and follow companies in your industry or niche because many of them may not be that savvy.

In fact, I recommend three types of research:

- Find companies *in your niche or industry* such as competitors.
- Find companies *in similar niches or industries* (e.g., B2B companies if your B2B, B2G companies if your B2G, etc.)
- Find some *big brands* that you and your team agree you like.

To start your research, download the “Instagram Research Worksheet.” For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code ‘**2018social**’ to register if you have not already done so), and click on the link to the “Instagram Research Worksheet.” Along the way, pay special attention to the “people” on Instagram and whether (and how) they are interacting with the brands you identify above.

## **Finding Companies on Instagram**

To identify companies on Instagram, start with your keywords. Let’s take a few hypothetical examples, such as a plumber, a wedding photographer, and a B2B company that sells business insurance. So we’d have keywords such as:

**Plumber.** *Plumbing, plumber, home improvement, DIY, toilet repair.*

**Wedding Photographer:** *weddings, marriage, photography.*

**Business insurance.** *Insurance, business insurance, small business, risk management.*

Here are the methods to search Instagram by keyword, looking for accounts to follow and reverse engineer:

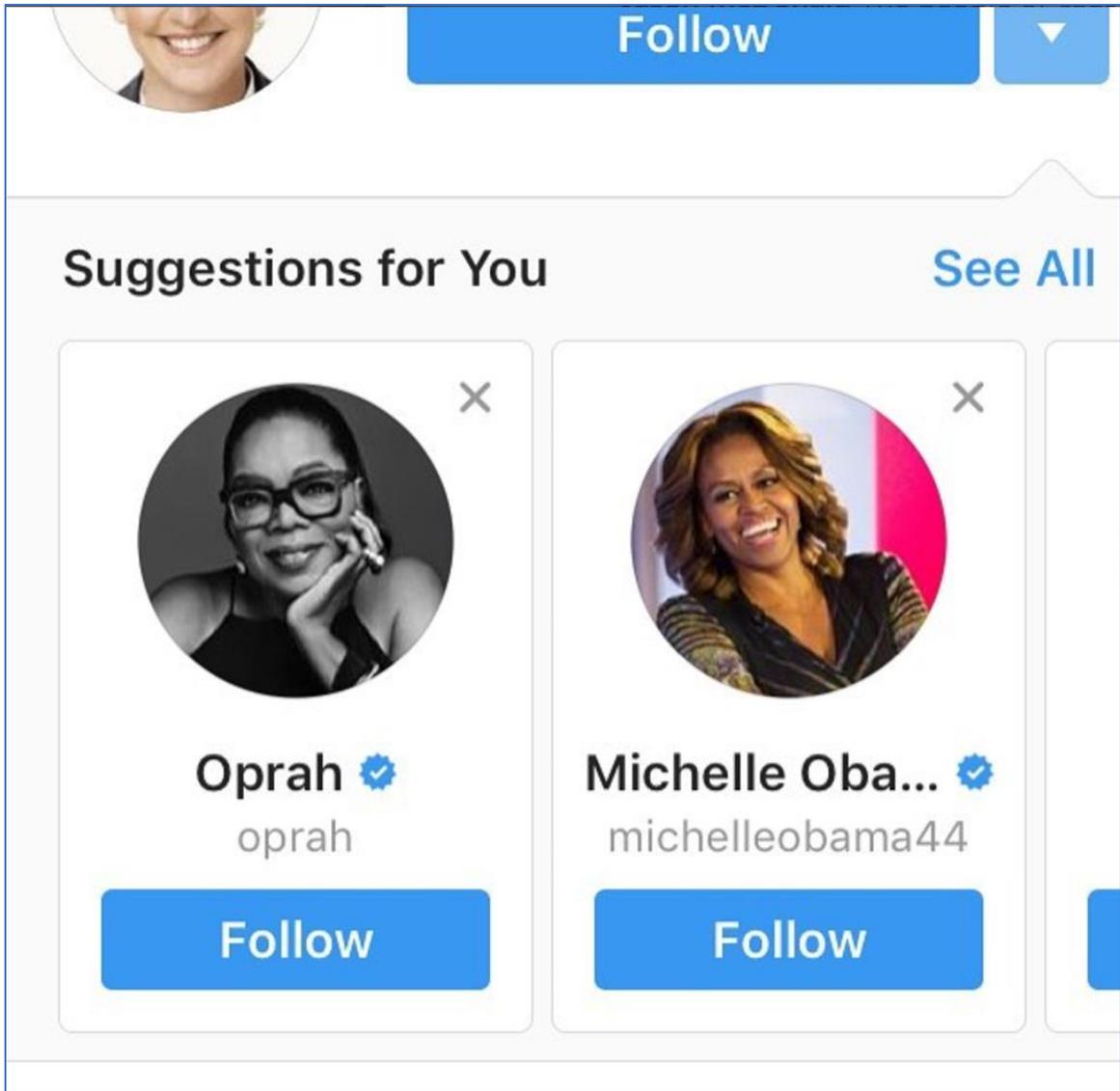
**Method #1: Instagram Search.** Go to Instagram, either on the desktop or on your phone. Type your keywords into the search box. Then look at the posts that come back, and click up to the account holders, or look at the comments and likes, and click over to those people who are interacting with the posts. Make a list of those accounts that fit your target.

**Method #2: Google Search.** Use Google. Go to Google.com, and enter *site:Instagram.com* plus your keywords, as in *site:Instagram.com “business*

*insurance*” (There’s no space between *site:* and *Instagram.com*, and use quotation marks around keyword phrases). To see an example, visit <http://jmlinks.com/28c>. Next, scroll down the list, and Google will identify accounts at Instagram that have those keywords.

**Method #3: Use a Geotag.** Type in a city name such as *Tulsa* (<http://jmlinks.com/28g>) or *Miami* into the Instagram search box. This is a good way to see the posts across a wide range of industries and topics, so that you don’t get “boxed in” to seeing just posts in your industry.

**Method #4: Instagram Explore.** Instagram Explore works best if you first configure your personal Instagram account for a few weeks, and be sure to follow competitors and others in your industry. Then, open up your Instagram App, and click the “Magnifying Glass” icon on the bottom. Instagram will suggest photos and accounts to you, based on your interests and behavior. By following competitors and paying attention to things “as if” you were a customer, you can get Instagram to find interesting companies to “reverse engineer.” You can also find one brand you like, and then click on the downward arrow to the right to see “similar” companies. Here’s a screenshot from my iPhone from @Ellen\_Degeneres, suggesting Oprah Winfrey and Michelle Obama’s Instagram accounts to follow:



### **Inventory Companies that You Find**

For example, if you search Instagram for *toilet repair* (<http://jmlinks.com/28a>), you'll find posts by people and a few companies on the topic. I found this post, for example:



*Toilet repair on Instagram, who knew?*

Notice that the post was made by @Islandmanplumbinggalveston (<http://jmlinks.com/28b>). So, click on the name of the account, and then you can start to “reverse engineer” this account and its posts. Take some notes as you and your team discuss what you like, and what you don’t like, about @Islandmanplumbinggalveston and its posting strategy.

**Profile Picture.** IslandMann’s is a red, white, and blue logo. Do you like it, or would it be better if it were a plumber, perhaps the owner?

**Bio.** IslandMann’s bio says 🛠️🏠 *Island Mann Plumbing* 🛠️🔧  
 📞 *Master Plumber Team serving Brazoria, Galveston & South Harris Counties*  
 🏠 *Whole house repiping and Start saving buy & install your Tankless Heaters*  
 🌐 *www.islandmannplumbing.com*. Do you like all the icons? If so, Google how to use icons on Instagram Bios. Of not, ignore them. Note what it’s missing such as email link or other call to action (but check it out on the mobile phone to make sure).

**Followers.** Note that it has 20 posts, 817 followers, and 223 following. This doesn't show a high degree of interactivity, so perhaps Instagram isn't for plumbers?

Take a moment and look up a few other plumbers. You might compare IslandMann with @theTacticalPlumber (<http://jmlinks.com/28d>). Compare the profile picture to profile picture, bio to bio, and follower count to follower count. Note, for example, how @theTacticalPlumber has hashtag (#PlumbSmarter, and #TheTacticalPlumber). Click on those and see what's going on among its customers. Can your company identify and create a unique hashtag for your own customers? Would they care enough to post photos tagged in that way? What about having a contest or customer reward incentive for the best photos posted to your hashtag?

## Posting Strategy

Next, note the interactivity of individual posts. Which ones stand out as something you – as a user – would take note of on Instagram, and even like, comment, or share? Which ones have the most interactivity? Why? Notice for example, this post (<http://jmlinks.com/28e>) which is a plumber pushup video, with 183 likes, and 21 comments:



Think deeply about each post. Notice, for example, that this isn't a plumber doing plumbing (*boring*), but it's a kind of sexy guy showing off how strong he is by doing push ups (*fun*). And then (spoiler alert), as you watch it you realize it's a spoof. It's very similar to posts that "real people" make on Instagram: it's personal, it's funny, and it's photogenic. And notice that it's actually a repost from somewhere else. So this post indicates that @theTacticalPlumber is being playful and fun with Instagram, not just posting boring plumbing stuff.

And yet, it does relate to plumbing, and it does build the company's brand. So what types of posts might you make that would be fun, playful, and photogenic and yet connect to your brand? Don't be boring!

As you look at Instagram accounts that pique your interest, try to "reverse engineer" each company's **posting strategy**. Looking at their posts, are they merely informative, fun, photogenic, or something else? How do they connect to the brand image that the vendor is seeking to project? How frequently are items posted? Look at likes, comments, and shares. Is their posting strategy engaging their users, and why or why not?

## A Different Vendor

Let's do this again with another search and vendor. My search on Google for *site:Instagram.com "business insurance"* led me to @WeddingInsuranceGroup (<http://jmlinks.com/28f>). This is a British company that offers insurance for vendors in the wedding industry. They have 97 posts, 503 followers, and are following 1137. Note that they are an insurer (*boring!*) but they also cross-connect to a very Instagram-friendly business, weddings (*fun!*).

Their bio says:

*The only insurer in the UK dedicated to providing the widest insurance cover for the wedding industry. Our social team are here Mon-Fri 9.30-5.30pm  
[www.weddinginsurancegroup.co.uk](http://www.weddinginsurancegroup.co.uk)*

Scroll down through their posts and attempt to "reverse engineer" what they've posted and why. You'll see a lot of posts with quotations speaking to the fear that the photography or catering equipment might get stolen, something go terribly wrong, and hence the need for business insurance. But also take a look at how they use hashtags such as #WeddingWednesday which reaches out not to just their B2B customers but people actually planning weddings who might be interested in insuring the big event (what if the

groom gets cold feet?). This is clearly a B2B business that is using Instagram to be visible on a venue that their own customers (Wedding photographers and the like) clearly see as essential. The wedding insurance itself isn't fun, but the way that they connect to the adjacent industry, is.

## Wrapping Up Your Research

For your **TODO**, download and complete the **Instagram Research Worksheet**. For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code '2018social' to register if you have not already done so), and click on the link to the "Instagram Research Worksheet."

Pay the most attention to **posting strategy**. After all, setting up an Instagram account isn't very difficult. It's what types of photos or videos get posted, how successful they are at generating interactivity, and how all this buzz connects to some business objective that matters. I recommend that you create an editorial calendar for all your social media posts; for Instagram, this would mean planning out what types of photos or videos you are going to shoot, when, where, and how. Like any good party, there should be a lot of systematic planning towards the food and entertainment that needs to be produced on a systematic and regular basis!

## » COMPARE INSTAGRAM TO SNAPCHAT

Let's talk for a moment about Snapchat. It's the media darling of the moment, it fits the stereotype of a lot of cool and hip youngsters with a great idea, working from a funky office on the beach, and like MySpace or Instagram before it, the hype factory is in full gear. Go to any Social Media Marketing conference, and you'll quickly see that the "cool kids" have decided that Snapchat is where it's at.

Or is it?

While I'm not against Snapchat, the power of Snapchat for small business marketing remains to be seen. It has many similar features to Instagram (admittedly, Instagram stole many of Snapchats ideas), but – ethics aside – the issue to consider is whether Snapchat will prove to be a better marketing vehicle for your business than Instagram or not. A few big, powerful brands with money to burn are busy burning their money on Snapchat, but unless your Ford or Hyatt Hotels, it's not clear that Snapchat has a clear path to quick marketing success.

# IT'S INSTAGRAM AND SNAPCHAT, NOT INSTAGRAM OR SNAPCHAT

## Both Snapchat and Instagram

In fact, I'd caution against *either/or* thinking, and recommend you do *both/and* thinking. For now, you can certainly ignore Snapchat, but as its features converge with Instagram, it's pretty easy to envision a reality in which you can pretty easily do both Snapchat and Instagram. In fact between snaps (photos) and Snapchat stories (videos), it's pretty similar to Instagram. The difference is mainly in how information is shared on each network, and who uses it, with Snapchat stuck primarily in the teenage set and Instagram reaching more people, some of whom are older than thirteen.

## Install and Learn How to Use Snapchat

If you're not on Snapchat, visit the Apple App Store or Google Play and download the Snapchat app. For a few good introductions to how to use Snapchat, visit <http://jmlinks.com/28h>, <http://jmlinks.com/28j>, and <http://jmlinks.com/28m>. You can browse the official Snapchat help files at <http://jmlinks.com/28p>.

Discovery and sharing on Snapchat are quite a bit different than on "traditional" social media networks, in that Snapchat is primarily a one-to-one social media network, one in which videos and pictures disappear after twenty four hours, while the other networks like Instagram are one-to-many. I can have *one* tweet on Twitter and it's pushed out to many *thousands* of followers, who can all like, comment, and share that tweet. That's not exactly possible on Snapchat. In addition, as a brand, I can have a *stable*, on-going account on Instagram where users can find me, easily, and where things don't disappear after twenty four hours. On Instagram I can have a clickable URL in my bio, and on other networks like Twitter or Facebook, I can insert links from a social media post to a desired action such as read my blog post, or buy my product on my eCommerce store. Hashtags, search and discovery are all far easier on the traditional social media networks vs. Snapchat. Snapchat, in my humble opinion, is in a bit of a bind because the very features that make it fun for teenagers such as the disappearance of posts, the lack of a stable footprint to one's account, and the one-to-one nature of the medium make it difficult for marketers to use.

## Snapchat Stories and Instagram Stories

The best opportunity on Snapchat is for you – as a brand – to share an in-depth story for your most passionate followers, or superfans. It’s as if your super fans wanted to follow you and your every move on Snapchat “as if” you were just another friend. Because discovery is so haphazard on Snapchat, you’ll have to use your offline promotion tactics (think “follow us on Snapchat”) to build a user community.

In addition, Snapchat reaches primarily the teenage crowd, so it’s demographic to date is very narrow vs. the much broader reach of Instagram, not to mention Facebook. Being all this as it may, unless you see a compelling reason to be on Snapchat as a business, you might ignore it for now or use it only on an experimental basis. Or, you might feed similar photos and video content to both Instagram and Snapchat, as the two networks are very similar when it comes to how they display and use content, even if they are quite different in how they broadcast that content. To learn more about Snapchat for business, visit <http://jmlinks.com/28n>.

### » BRAINSTORM AND PLAN AN INSTAGRAM MARKETING STRATEGY

Returning to Instagram, it’s time to brainstorm, plan, and execute an Instagram marketing strategy for your company. I’ll assume you’ve researched your customer base and decided they’re on Instagram, plus looked at competitors, similar companies, and just brands that “get it,” to get a sense of what you like and what you don’t like about brand marketing on Instagram. You’ve completed the *Instagram Research Worksheet*. Now download the *Instagram Posting* and *Instagram Marketing Plan Worksheets*. (For the worksheets, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code ‘**2018social**’ to register if you have not already done so)).

### Instagram Set Up

The *Instagram Research Worksheet* gives you your basics. Identify a profile picture. Write a bio that includes a link to your website. Decide if you want to enable a clickable email link. And decide if you want to use an Instagram-related app such as Like2b.uy (<http://jmlinks.com/32w>) or Olapic’s Tap-shop platform at <http://jmlinks.com/32z>. Enable at least one Instagram account for your business, but you’ll probably need to manage multiple accounts on your phone. If more than one person will be uploading photos and videos, then have multiple people enable it on their phones. Consider using a third party app like Hootsuite to manage your posts.

## Instagram Posting Strategy

Here's where the rubber hits the road. First and foremost, decide if you are a *fun* company in a *fun* industry, where people will want to share photos of themselves directly using your product or service, or you're a *fun or not fun* company in a *fun or not fun* industry, where you'll have to strategize something adjacent to your industry. Are you an Airbnb that's directly fun? Or are you more like an airline like Aeromexico where the experience itself isn't that fun, but there's something adjacent (travel) that is fun? Or are you like AllState Insurance where your industry isn't fun, and it's not really adjacent to anything that's fun, either? So check off:

- We're a *fun company in a fun industry*, so we'll post (and get our fans to post) fun photos of them actually using our product or service.
- We're a *not fun company in a fun industry*, so we'll post (and get our fans to post) fun photos of them using something adjacent to our industry.
- We're a *not fun company in a not fun industry*, so we'll really have to think out of the box to use Instagram!

Your **posting strategy** will reflect that structure.

## ARE YOU A FUN COMPANY, OR A NOT FUN COMPANY?

Next, identify who's going to take what photos / videos, when, where, why, and how. Create an editorial calendar to pre-identify Instagram opportunities such as industry holidays or events (think Cinco de Mayo if you're an avocado company, or Christmas if you're an Irish gift store). Other opportunities might be when customers use your product or service in a photogenic way; think "Kodak Moments" like they used to have in Disneyland. A museum store might have a contest among its customers to share a fun photo of mom or grandma with the kids, buying fun stuff in the store. What are your "Instagram moments" for your business? Think ahead for when there are the best

opportunities for Instagram buzz, and write those down in your posting strategy worksheet.

Finally, start posting! Instagram – like all social media – requires that you post a lot of content on a regular basis, and you won't know what works until you start doing it. So get started!

## **Instagram Marketing Strategy**

In the long term, you want to first establish where your company sits in the matrix of fun / not fun. The *Instagram Marketing Worksheet* helps you keep your eye on the big picture of successful marketing on Instagram. Begin posting in such a way that it fits your theme. Establish some KPIs (Key Performance Indicators), such as:

- **Followers.** Measure your follower count each month. It should go up.
- **Engagement.** Measure, for each post, is it getting likes, comments, and shares. Which posts get the most engagement? Why or why not?
- **Action.** You're not in this for your health. Is Instagram –
  - **Building your brand?** Increasing your brand awareness in a positive way? If so, why? If not, why not, and what can you do to fix it?
  - **Leading to sales** actions such as completed feedback / inquiry forms or purchases at an eCommerce website? For some brands (e.g., Airbnb, Rusticuff), Instagram CAN lead to real sales, but for others this isn't a realistic objective.

Your Instagram strategy – working *backwards* – should go from a sale / sales lead, to better brand awareness, to a fun, photogenic post by you or a fan, to a strong account on Instagram. To devise your strategy, don't start at a conceptual level with the photo or post; rather, start with what you want either better brand awareness or an actual sale (or both), and work backwards.

Don't forget to think about user generated content (UGC). How can you use contests, hashtags or other prompts to motivate your customer fans to engage with you on Instagram and even create and upload fun content around your brand?

Finally, on an on-going, monthly basis, measure your Instagram performance on your KPIs and record them as you should be doing for other social media networks like Facebook, LinkedIn, or Twitter. Is your fan base growing? Is your engagement growing?

Are you seeing improvements in your brand equity? And are you getting any actual sales performance from your social media efforts? How can you improve?

Think of your Instagram strategy as the Big Picture of why your company is on Instagram in the first place, and your posting strategy as the tactical manifestation of this. Everything needs to work together towards a common goal of bolstering your brand on Instagram.

## » PROMOTE YOUR INSTAGRAM ACCOUNT AND POSTS

The best Instagram account in the world isn't worth a hill of beans if no one sees your posts. Like all "parties" on Social Media, you have to promote your Instagram "party" for it to be successful. First, populate your Instagram account with fun photos even if you have zero or just a few followers. There has to be something there that people want to engage with before you start promoting.

Once you're up and running, here are ideas on how to promote your Instagram account and posts:

**Real World to Social.** For most businesses, this is by far the most important tactic, and the cheapest. Simply ask your customers to follow you on Instagram at the point of real contact. A museum gift shop, for example, can install placards at check out that say, "Follow us on Instagram," or even better, a small tablet displaying the store's Instagram account in real time that people can see and click on as they wait in line. Have the clerks ask people if they're on Instagram, and ask them to follow the shop. "Why follow us?," you ask. Because we share fun photos, have contests, and even communicate special deals and discounts!

**Shout outs and Collabs.** Identify complementary vendors in your niche, and reach out to them for collaborative Instagram marketing. If you're a wedding photographer, reach out to the wedding florist, the wedding venue, the cake maker, the priest, rabbi, or other officiant at the wedding... ask them to "collab" with you and/or give you a "shout out," and reciprocate.

# YOU GOTTA PROMOTE YOUR INSTAGRAM TO BE SUCCESSFUL

**Hashtags.** Instagram is very hashtag-friendly. Be sure to use **geotags** (your location) in your posts, and identify and use relevant hashtags. People use Instagram like a magazine, to discover content that they care about, so deploy hashtags that feed that interest and make sure that the content they will discover is “sticky” so that they follow your account. (Use [hashtagify.me \(http://jmlinks.com/27v\)](http://jmlinks.com/27v)) to find trending hashtags on Twitter and Instagram that are relevant to your brand, and include them in your posts. In addition, identify one or more hashtags unique to your company to encourage social sharing around your brand. REI does this, for example, with *#optoutside* across all its social media channels.

**Website / Other Social Media.** Be sure that your website links to your Instagram, easily, and cross-promote from your other social accounts (e.g., Twitter) to your Instagram. Don’t forget to use your customer email list and email newsletters to promote and advertise your Instagram. Use one social media to promote another.

**Interact with Others.** Follow other accounts, and like, share, and comment on posts made by those accounts. Identify your competitors, and look at who follows them. Follow those people, and like, share, and comment on their Instagram accounts. **Warning:** Be aware that if you follow / interact with too many accounts too quickly, you can get banned from Instagram! (See <http://jmlinks.com/28r> for more information). So don’t be spammy! More tips on being interactive –

**Follow Relevant People.** “Follow for follow” still works on Instagram, so identify and follow industry leaders, the followers of your competitors, etc..

**@Mention People.** Mention out key influencers, your own users and other people in general in your comments and captions. By “shout outs” to others, you’ll get their attention.

**Like and Comment on the Posts of Others.** Look at your users, and the friends of your users, and like their posts. Ditto for comments. Comment on what others are doing on Instagram.

**Reshare Your Users's Posts.** Selectively share / or repost some of your users' posts (with their permission). Sharing isn't as easy on Instagram as on Facebook, but you should still do it. For example, you can reach out by email to someone who posts a photo, have them email it to you, post it to your account and include their @handle in your caption.

**Engage with Your Own Users.** Instagram isn't just about broadcasting to your customers. It's also about interacting with, and engaging with them. Pay attention to who follows you, already, and interact with their comments to your account. Follow them back. Spend at least an hour a day interacting with your customer. Identify and cultivate superfans that might be willing to promote your business. Ask your fans for comments. Post a picture of a draft product or service, and ask users for their opinions. Post a survey question and ask users to chime in in the comments field. Post a photo and ask for a caption; have a caption contest, and give the winner a gift card. Be provocative!

**Advertise on Instagram.** Yes, Instagram has advertising! And yes, you can use it to promote your Instagram business account, as well as offlink to your website or eCommerce store. Since Instagram is owned by Facebook, you manage an Instagram ad through your Facebook account. You need a Facebook Page for your business and need to connect that Page to your Instagram account to be able to advertise. You can read the official help file at <http://jmlinks.com/28w>. Note: unfortunately you can't just advertise on Instagram, but have to simultaneously advertise on Facebook and Instagram.

### **Instagram Contests.**

Among the most important Instagram promotion strategies are **contests** and **giveaways**. One easy way to do this is to establish a hashtag for your brand, and then ask users to post a photo on that hashtag as part of the contest or giveaway.. You select a winner, based on the posts. For an example, check out *#jorgstyle* which has had a contest based on user photos (<http://jmlinks.com/28s>). Here's a screenshot of the singer Pitbull, who's using the hashtags *#contest*, *#Pitbull* and *#Mr305* to promote his brand via a contest. Yes, you can go to Las Vegas and see him live – just post a picture of you and your Mom. What's more special than a picture of you and your mom honoring

Pitbull? (A selfie of you and your mom at the Pitbull concert in Las Vegas shared to Instagram, of course).



The image shows an Instagram post from the account 'pitbull\_updates'. The main graphic is a promotional poster for a contest. At the top, it says 'Meet me in LAS VEGAS NEVADA' with a diamond-shaped logo. Below that, in large purple cursive, is 'Celebrate Mom'. The central text reads: 'WIN AN ALL-EXPENSE PAID TRIP TO LAS VEGAS FOR 2 TO SEE PITBULL IN CONCERT AND HAVE DINNER WITH HIM!'. A purple arrow points down to the text 'UPLOAD A PHOTO OF YOU AND MOM BELOW'. At the bottom of the poster, it says 'NO PURCHASE NECESSARY TO ENTER OR WIN. OPEN ONLY TO LEGAL RESIDENTS OF THE UNITED STATES. AGE 18 OR OVER. VOID WHERE PROHIBITED.' The Instagram post interface shows the profile picture and name 'pitbull\_updates' with a 'Follow' button. The caption reads: 'pitbull\_updates #CONTEST: Enter to win an all-expense paid trip to see @Pitbull in Las Vegas to see him in concert and have dinner with him. Three other winners will also be randomly selected to receive a video call from Pit. ENTER NOW AT: photoandgo.com/pitbull'. There are several comments from users like 'alejandra.acp', 'meghanalleyxx', 'armandos\_angel', and 'mzj\_j'. The post has 238 likes and is dated APRIL 27.

A quick way to browse contests and look for contest ideas on Instagram is to use the Google search site: *Instagram.com #contests* at <http://jmlinks.com/28t>. Of course, there are vendors such as Glead.io that will help you manage Instagram contests (<http://jmlinks.com/28u>). Just Google “Instagram Contests” and you can easily find helpful vendors or apps. Read the official Instagram restrictions at <http://jmlinks.com/28v>.

### »»» CHECKLIST: INSTAGRAM ACTION ITEMS

Test your knowledge of Instagram! Take the *Instagram marketing quiz* at <http://jmlinks.com/qzin>. Next, here are your Instagram **Action Items**:

#### Research -

- ❑ Whether **your customers** are on Instagram. If so, what or who are they interacting with? What turns them on, and why?
- ❑ Whether **your competitors** are on Instagram. If so, what is their Instagram posting strategy and does it seem to be working as measured by followers and interaction? Why or why not?
- ❑ Whether **there are similar companies to emulate**. Are there companies (not your competitors) that are doing a good job on Instagram? If so, who are they and what are they doing?
- ❑ Whether there are relevant **#hashtags** on Instagram or **#geotags** that connect potential customers to themes that make sense for your business.
- ❑ **Set up** a business profile on Instagram, including –
  - ❑ **Profile Picture**
  - ❑ **Bio Description with link.** Describe your company’s value proposition in a fun way, and use a service like Like2Buy if desired.
  - ❑ **Posts.** Begin posting photos and/or videos of your business that fit to the Instagram culture of friends, family, fun, photos, and fake.
- ❑ **Brainstorm a content marketing strategy** for Instagram. Are you a “fun company” in a “fun industry,” a “not fun company” adjacent to a “fun industry,” or a “not fun company” that’s not near “anything fun?” Then brainstorm –
  - ❑ **Photos** to take of your business, products, and/or services that “fit” with Instagram.
  - ❑ **Videos and Instagram Stories** that “fit.”
  - ❑ **UGC** or “User Generated Content.” How can you get your fans / customers to not only interact with content you produce but produce content themselves that helps build your brand?
- ❑ **Promote** your Instagram business profile through strategies like #hashtags, follow for follow, cross-connections to other digital properties like your website, Twitter, Facebook, etc., and even consider contests or advertising on Instagram.
- ❑ **Measure** your Instagram results such as increase in followers, increases in post interactivity, traffic to your website and/or eCommerce store.

Check out the **free tools**! Go to my *Social Media Marketing Dashboard > Instagram* for my favorite free tools on Instagram. Just visit **<http://jmlinks.com/smmdash>**.

## »» **DELIVERABLE: AN INSTAGRAM MARKETING PLAN**

Your **DELIVERABLE** has arrived. For the worksheet, go to **<http://jmlinks.com/workbooks>** (click on *Social Media Workbook 2018*, enter the code ‘**2018social**’ to register if you have not already done so), and click on the link to the “Instagram Marketing Plan.” By filling out this plan, you and your team will establish a vision of what you want to achieve via Instagram marketing, including your KPIs (Key Performance Indicators). Be sure to complete the Instagram research and posting worksheets as well.





# 7

## YOUTUBE

YouTube (<https://www.youtube.com/>), in particular, and video in general, provide a two-for-one punch to your social media marketing. First, video itself can be the “there there,” the content that you post to Twitter, Facebook, LinkedIn, etc. People love, watch, and share video as one of the most popular types of content across social media. Second, YouTube is a social media platform that works much like Facebook or Twitter. As on other platforms, people “like” (*thumbs up* in YouTube lingo), “comment on,” and “share” your videos. They “subscribe” to your channel and get notifications when you release a new video. YouTube, in short, is both *content itself* and a social media platform *in its own right*.

In this chapter, we’ll explore both aspects of YouTube. You’ll see similarities to Facebook: setting up a channel (“Page”) on YouTube, uploading a video (“post”) to YouTube, and the fact that people subscribe to your channel (“like” your “Page”). All of these dynamics are similar to other social media platforms. But video also brings three very different marketing mechanisms to the social media party in its role as content. Video can be used as a **supportive medium**, it can be deployed via **SEO** (Search Engine Optimization) to show at the top of Google and/or YouTube searches, and it can be tweaked for **social sharing** or even **viral marketing**.

**Let’s get started!**

### **To Do List:**

- » Explore How YouTube Works
- » Inventory Companies on YouTube
- » Set up Your Channel and Upload Videos
- » Understand the Three Promotional Uses of Video
- » Explore Video on Facebook as an Alternative

- » Advertise on YouTube
- » Measure your Results
- »» Checklist: YouTube Action Items
- »» Deliverable: A YouTube Marketing Plan

## » EXPLORE HOW YOUTUBE WORKS

Video and YouTube are among the most dramatic, most viral components of the Internet. Who doesn't know the "Harlem Shake" (<http://jmlinks.com/1m>) or the "Ice Bucket Challenge" (<http://jmlinks.com/1n>)? Who hasn't watched "Will it blend" (<http://jmlinks.com/1o>) or "Dear 16 Year Old Me" (<http://jmlinks.com/1p>)? And who hasn't fallen into the trap of assuming all YouTube is are silly cat videos, Rihanna videos, and inappropriate High School humor? It is, but YouTube is much, much more than that as a marketing opportunity (and as a social phenomenon).

As we shall see, there are three basic ways that YouTube videos can help you with social media marketing:

1. **Video as a supporting medium:** acting as the "content" that you "share" via other social media, including your website. (This is also true for video on Facebook).
2. **Video as a discovery mechanism via SEO** (Search Engine Optimization), helping you promote your company, products, or services via YouTube and Google search.
3. **Video as a share / viral promotion tactic**, because people love and share provocative videos, not just on YouTube but via networks like Facebook, Twitter, or Pinterest.

**VIDEO.** Watch a video tutorial on the three uses of YouTube for marketing purposes at <http://jmlinks.com/16z>.

We'll dive into the details in a moment. But first, log on to YouTube and get your bearings. (For the official YouTube starter guide, go to <http://jmlinks.com/1q>). If you're familiar with Facebook and Twitter, you'll see many similarities right out of the gate:

- Individuals have an “account” or “**channel**” on YouTube, set up by registering with an email address and using Google / Google+ to manage their account.
- Individuals can **upload videos** to their “channel,” and when uploading, give each video a TITLE, a DESCRIPTION, and KEYWORD TAGS as well as designate a VIDEO THUMBNAIL.
- Individuals “**subscribe**” to the channels of other individuals (or brands) on YouTube, and when someone you subscribe to uploads a new video, you get a notification in your YouTube news feed as well as via email that a new video has been posted.
- Individuals can **thumbs up / thumbs down videos** (akin to “like” on Facebook of a post), comment (via Google / Google+ comments), and share the videos via other social media as well as create playlists of videos on YouTube.
- Companies can create **brand channels** on YouTube. Like Twitter or Instagram, YouTube is very easy and open: anyone can quickly create a channel, no serious user authentication is required.

For assistance on how to set up a company YouTube channel, visit <http://jmlinks.com/1r>.

## » INVENTORY COMPANIES ON YOUTUBE

After you’ve signed up for YouTube at least as an individual, your mission is to identify competitors on YouTube as well as brands that interest you in order to make an inventory of your likes and dislikes when it comes to YouTube as a channel for marketing.

### How to Browse YouTube for Videos and Channels

One obvious way to make your short list of companies to follow is to simply visit their websites, and look for a link from their website to their YouTube channel. A big brand like REI (<http://www.rei.com/>), for example, will usually have the YouTube icon somewhere on their home page, often in the footer. Simply be signed into your personal YouTube account, click on their link to YouTube, and then once you land on their channel, click the red “subscribe” button.

A second way to find companies to subscribe to is to **browse YouTube**. When you are logged in to your YouTube account, simply click on “Browse channels” located on the left hand side of the screen.

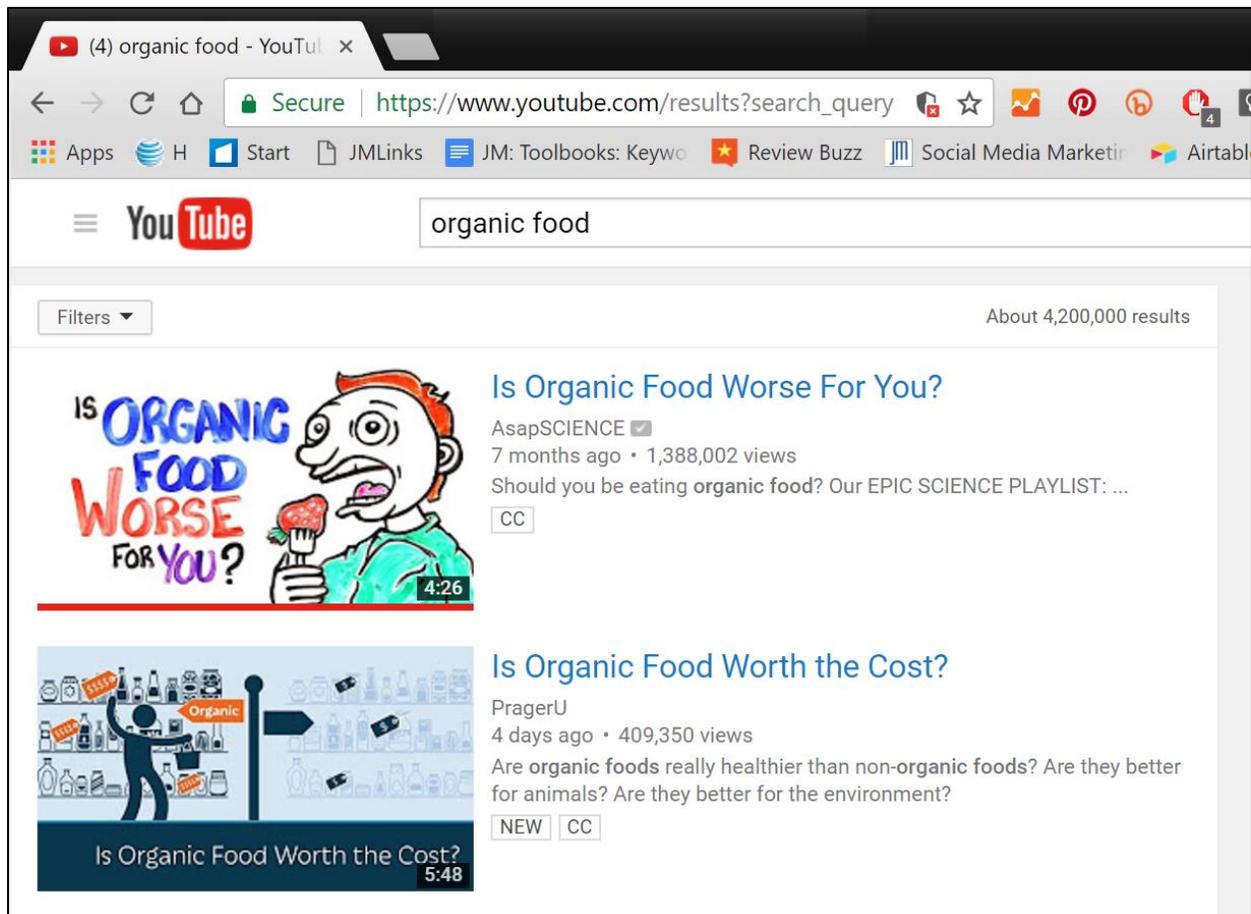
There you'll see various subject-oriented groups of YouTube content, starting with *#PopularonYouTube*. On each category, you can click on the category name (e.g., *Film and Entertainment*), and drill down to channels in that category. Identify channels that interest you and hit the "subscribe" button. As you subscribe to channels, they will begin to appear on your home screen on the left column. To unsubscribe, just click on "Manage subscriptions" and/or go to the channel and hit the now-gray "Subscribed" button.

## How to Search YouTube

Most of the action on YouTube really occurs at the level of the video, and not the channel, however. By this I mean that most of the high video counts, sharing, and even videos discovered via search occur via individual videos and not channels. You need to be a good searcher to understand YouTube!

**VIDEO.** Watch a video tutorial on how to search YouTube at <http://jmlinks.com/17a>.

To search YouTube directly, simply type keywords that matter to your company into the search bar at the top of the screen. For example type, *organic food*, to find YouTube videos on *organic food*. Here's a screenshot:



Like the Google search engine, YouTube will return a list of the most relevant videos. Simply click on a video to watch it, and then click “up” to the channel to learn more about the channel that produced it. Or you can just hit the red “Subscribe” button directly to subscribe to the channel. Here’s a screenshot:

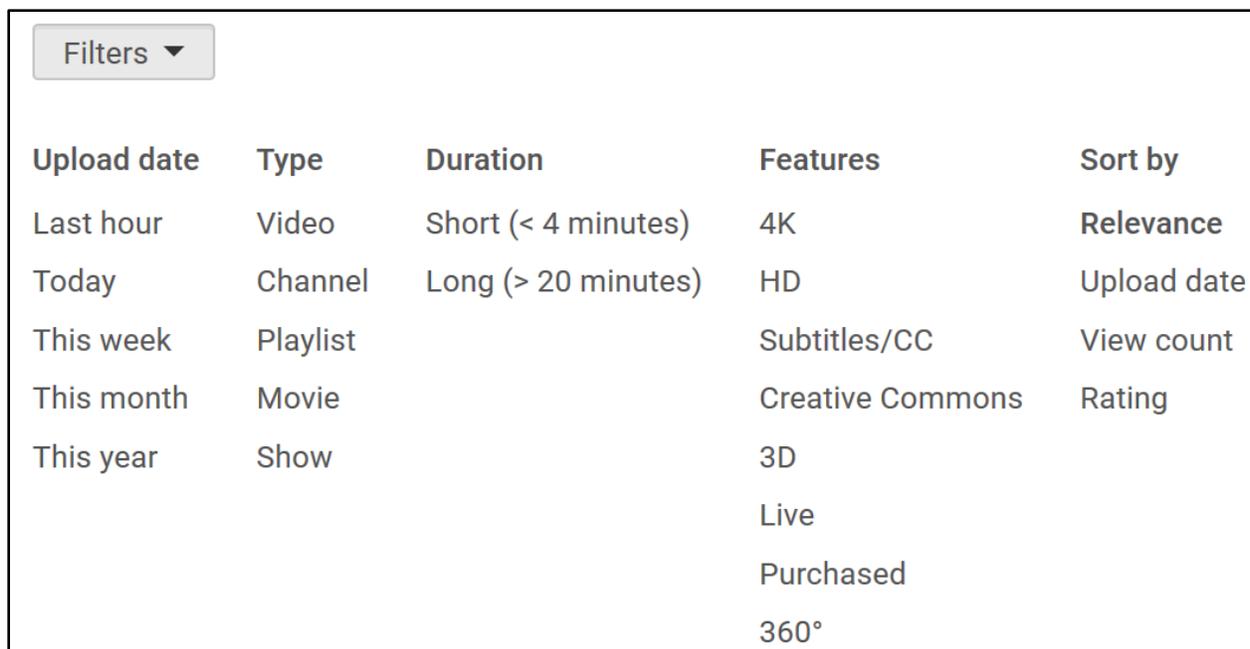


You can also thumb up / thumb down a video, comment on it (using your Google / Google+ account), and share it. If you click on the share icon below a video, YouTube gives

you all the social icons plus a link to “Embed,” which provides the HTML code you need to embed a video on your own website or blog.

## SEARCH YOUTUBE BY KEYWORDS TO FIND RELEVANT VIDEOS AND CHANNELS

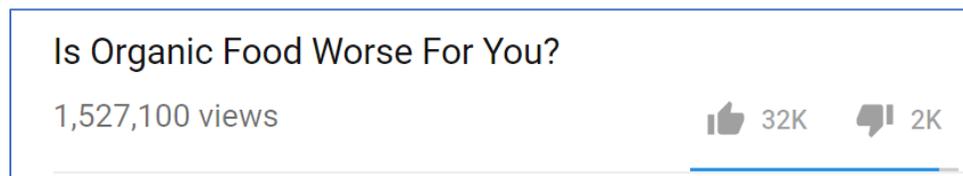
Going back to search, type “organic food” into the search bar. Next, on the top right, click on **Filter**, which opens up a set of parameters by which you can narrow your search. Here’s a screenshot:



Click *Upload date* > *This year*, which will turn on *filter #1* (videos of the last year), then relick *Filter*, and then click *Sort by* > *View Count*, which will turn on *filter #2* (most popular). In this way, you can find the most popular videos by view count vs. a time period (one year). You can also do this by week or month.

Remember: you are looking to understand what type of content is popular in your industry! Next click around at the various videos, and identify what sorts of topics you find people producing and watching in your industry. Pay attention to the thumbs up / thumbs down count, and comments per video. Like a good party planner, you are looking to identify the types of entertainment that attract and engage your guests.

With respect to an individual video, pay attention to the total views, thumbs up / thumbs down, and comments. Here's a screenshot of individual video data for the video, "Is Organic Food Worse for You?"



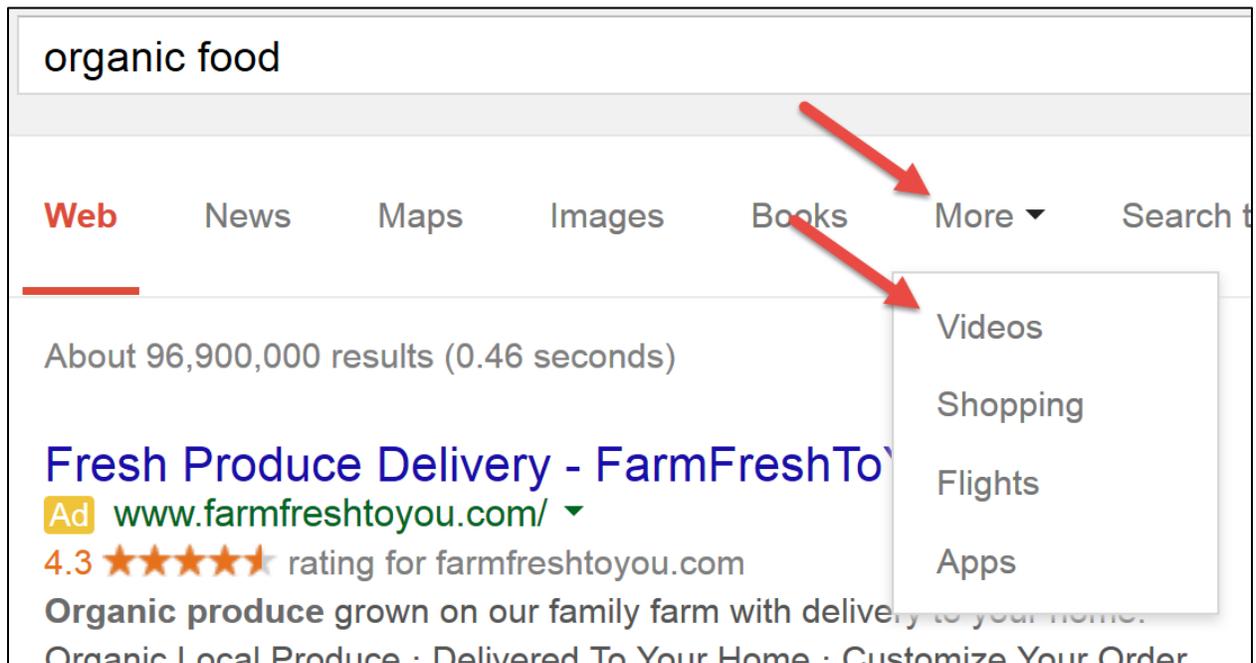
This means that this video had 1.5 million views, 32,000 thumbs up, and 2,000 thumbs down. If you scroll down to comments, you can see the **comments** count (3,990 as of October, 2017), and you read through them. In this way, you can see how "popular" a video is on YouTube and how "interactive" it is vis-à-vis the user base.

## COMPETITOR VIDEO DATA IS HIDDEN UNDER EACH VIDEO

You can gather this data, first, for competitor videos or videos that intrigue you to reverse engineer what works in terms of marketing via YouTube. Then, on your own videos, you can use this feature to see how well an individual video is performing.

### **Search Google for Videos**

Another way to find interesting videos by keywords is to search Google. First type your keywords into Google, and then click the *more > videos* button. Here's a screenshot:



You can also use the button “Search Tools” to filter these results by videos of the last year, or by source (e.g., CNN.com or YouTube.com), but unlike on YouTube itself, you can’t filter by view count.

**VIDEO.** Watch a video tutorial on how to search YouTube at <http://jmlinks.com/17a>.

By browsing, searching YouTube directly, or searching Google for videos, your objective is to identify videos that have high view counts as well as high thumbs up / thumbs down, and comments. What do people like? Why do they interact with it? How can this knowledge be applied to videos relevant to your company? Your goals or questions are:

- Are your potential **customers** on YouTube, and if so, what types of videos are they watching? Which relevant videos have the highest view counts? Why?
- Are **companies** similar to yours on YouTube, and if so, what kinds of videos are they producing?

- What types of videos are gaining the most **interactions** as measured by thumbs up / thumbs down, comments, shares, and subscriptions to the channel?

For your first **TODO**, download the **YouTube Research Worksheet**. For the worksheet, go to **<http://jmlinks.com/workbooks>** (click on *Social Media Workbook 2018*, enter the code ‘**2018social**’ to register if you have not already done so), and click on the link to the “YouTube Research Worksheet.” You’ll answer questions as to whether your potential customers are on YouTube, identify brands to follow, and inventory what you like and dislike about their YouTube channels and individual videos.

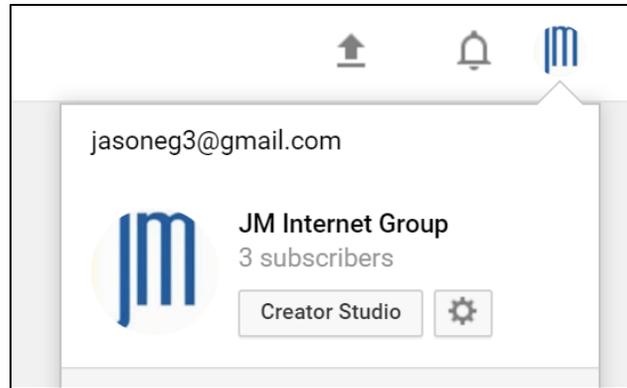
## » **SET UP YOUR CHANNEL AND UPLOAD VIDEOS**

After you’ve made an inventory of YouTube channels and videos that interest you from a marketing perspective, you’re ready to set up your own YouTube channel. Assuming you haven’t done this already, the best way to do this is from your Gmail or Google+ account. Here are the steps:

1. **Login to your Google account** (either via Gmail or an email address for which you have created a Google account).
2. **Go to YouTube** by typing **<https://www.youtube.com/>** in the browser address bar, or using the Google pull down menu to go to YouTube.
3. Go to your Channel List at **<http://jmlinks.com/31w>**.
4. Click on “Create a new channel.”

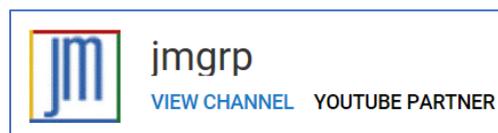
(For the official YouTube help article on how to create a channel, visit **<http://jmlinks.com/12z>**). At that point, you will be “inside” your new YouTube channel. (If you already have a channel, simply login to YouTube.)

On the top right of the screen, click on your profile picture, and then **Creator Studio**. Here’s a screenshot:



That gets you into the settings for your channel, as well as **video manager** (where you manage your videos). Click on “Community,” where you can manage the ability of users to post comments to your video. Under “blocked words,” for example, you can forbid the use of certain words, as well as ban users who have not behaved well from interacting with your channel. You can also use YouTube filters to control comments and block possibly spammy content from autoposting (where you then approve or disapprove it).

To change your *profile picture*, go back to the initial view of Creator Studio, and click View Channel. Here’s a screenshot:



It can be a little hard to toggle between the Creator Studio settings and the “View Channel” settings, so sometimes just log all the way out and start over at YouTube.com.

Then, click on your picture on the top right, hover over it, and click change. You can also upload *channel art*, which are similar to Facebook cover photos. Fill out your Channel “About > Description” section with keyword-heavy but short content explaining what your Channel is about, and why folks should subscribe to it.

Click on *Channel*, on the left navigation. There are some basic set up and optimization tasks there such as setting up a customer URL or regarding how public your channel is, whether you allow advertising, etc. I do not recommend that you allow advertising or monetization on your channel, as your goal once you have a customer viewing your videos is for them to buy your product or service, not to go off and buy someone else’s.

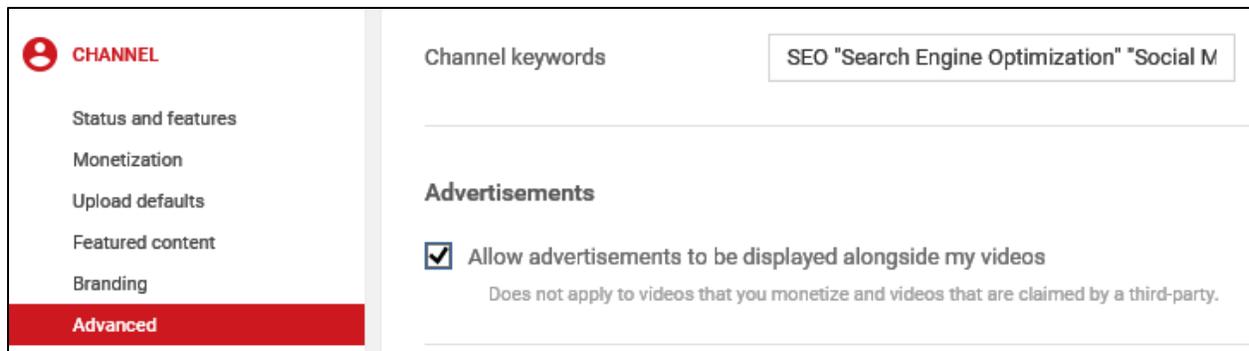
Furthermore, unless your view count is in the millions, you'll earn next to nothing via YouTube monetization. (The only practical reason to monetize a video is if you absolutely insist on using copyright-protected music; for that sort of music to be allowed, you must allow advertising on your video via monetization).

Next, let's **customize your Channel's** look and feel. Here's how:

- From inside "Creator's Studio," click the View Channel link in blue. Next, click on the blue "Customize Channel" link and then you'll see a pencil icon to change these images.
- Click on the "About" tab to get to your Channel Description including information on how to contact you, and links to your other social channels such as Facebook or Twitter.
- **Unsubscribed Trailer.** This is the YouTube name for the video that people see who are NOT subscribed to your channel. Click on "For returning subscribers" to designate a video for this feature. Think of it as a "Here's why you should subscribe video." To get to it, click "Home" and then you should see two tabs, "For returning subscribers" and "For new visitors." (For the official YouTube help file on this issue, visit <http://jmlinks.com/36u>).
  - You need a short, introductory video about your channel to proceed. Once you're upload that introductory video, then enable it by clicking to the tab "For new visitors." In this way, anyone not subscribed to your channel can get a nice introduction to your Channel explaining WHY they should click that subscribe button. Learn more by reading the official "best practices" from YouTube on Channel trailers at <http://jmlinks.com/31x>.

## Channel Optimization for SEO

YouTube is the No. 2 search engine, ahead of Bing (but behind its parent, Google). As I will discuss, you can optimize your YouTube videos for search by including relevant keywords. You should do the same with your channel. Place keywords in your channel keywords field. To enter your channel keywords, click on *Creator Studio* > *Channel* > *Advanced* > *Channel* keywords. Here's a screenshot:



On the Advanced tab, you can also link your YouTube account to your AdWords account, as well as to your Google Analytics account for metrics purposes. Don't forget to associate your YouTube account with your website as well. To do this, fill in your website <http://> address in the "Associated website" field.

## Upload Videos

To upload a video, click back to your profile picture, then select "Creator Studio." Then on the right-hand side click the "Upload" icon. Select a video to upload, and start uploading. As we will discuss below, input:

- **Video Title:** Write a keyword-heavy but catchy video title.
- **Description.** Write a keyword-heavy but catchy video description. Include an <http://www.yourcompany.com> link to your website. Be sure to use the <http://> prefix, as that makes it "clickable" to your website.
- **Tags.** Identify no more than five relevant keywords tags for your video.
- **Public:** set the video to *public* (anyone can see), *unlisted* (only people with the link can view), or *private* (restricted access).
- **Custom thumbnail.** Upload a custom video thumbnail, which will appear in YouTube search. Or, YouTube will automatically create three options for you.

For your second **TODO**, download the **YouTube Setup Worksheet**. For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code '**2018social**' to register if you have not already done so), and click on the link to the "YouTube Setup Worksheet." You'll answer and outline the basic setup issues for your YouTube channel.

## » UNDERSTAND THE THREE PROMOTIONAL USES OF VIDEO

While other social media have a posting strategy and posting rhythm, videos on YouTube are best understood by their three promotional strategies. While YouTube does have channels, subscriptions, and social spread just as other social media, the lion's share of activity comes directly from the videos themselves. Thus, it is very important to understand the three promotional uses of video.

### **YouTube Noise: Pop Culture**

Before we turn to those uses of video, however, let's pause for a moment and consider the tremendous noise caused on YouTube by pop culture. When you innocently login to your YouTube account, you will be bombarded by a) music videos, b) ridiculous college humor / professional / silly videos, c) movie trailers, d) crazy trending news and so on and so forth. This is the dominant use of YouTube in terms of views, but just as cable TV has hundreds of channels and you can drill down to very specific, and very useful channels and programs (think, for example, about cooking or fishing shows on cable TV, that are not high volume but are very high value to people who really care about cooking or fishing). So, before your boss freaks about and dismisses YouTube because of the crazy videos on cats and the videos by pop culture media icons, remember that for most of us marketers the value of YouTube is in the **niches** that matter to us: the niches that create and contain content that our customers care about. They exist: you just have to find them!

**Quantity** is about video views count.

**Quality** is about whether your videos are reaching your target customers and leading to brand awareness, email sign ups, sales leads, or even sales.

## YOUTUBE'S RICHES ARE IN THE NICHES

Let's investigate the three basic uses of YouTube.

### **#1 Use of YouTube: Supportive Use of Video**

If a picture is worth a thousand words, a video is worth ten thousand. If you are selling a complex product or service, creating and hosting explanatory videos can really help your sales process. Let's face it. Today's busy consumer doesn't really want to read a lot of text! They like videos because videos convey a lot of information quickly and easily, and videos convey emotional content.

Let's assume, for example, that you are a personal injury attorney in San Francisco. People are going to search for you via Google with keyword searches like "Personal Injury Attorneys SF," or "Auto Accident Attorney Bay Area." Then, they're going to land on your website, see a lot of intimidating text, and want to learn more about you as an attorney. Are you smart? Are you nice? Are you someone that they can trust?

In the old, pre-video days, they'd have to call you on the phone and come in for a quick interview. Then, they'd get in the car with their spouse, and have a little chat: *did you like her? Did she seem smart? Could we trust her with our case?* It would be all about "emotional intelligence," and "gut feeling."

Video allows you to post a quick introduction to you and/or your firm on your website, and start that process of "emotional intelligence" in just a few clicks of the mouse. In a very non-threatening way, videos give you the opportunity to pitch to a potential customer.

Here are some examples of this "supportive" use of video from the personal injury lawyer community. These videos that are not meant to "go viral," but rather to "support" the content of a website:

**Mary Alexander Law** (<http://www.maryalexanderlaw.com/>). Notice the video right on the home page.

**Sally Morin** (<https://www.sallymorinlaw.com/>). Ms. Morin produces a series of videos, again right on her home page.

**Walkup Law** (<http://www.walkuplawoffice.com/>). Click on "watch our firm's approach."

Now, these videos may or may not be hosted on YouTube. That's not the point. The hosting location is not important: what's important is that in a complex industry such as legal services, these companies are using video to "support" the content of their website, and provide potential customers and "easy" way to acquire some "emotional intelligence" about the law firm.

*A **supportive** video explains what you company offers, using a friendly, visual video format to communicate emotional trust.*

Another area that uses videos in a supportive way is the technology industry. Take a look at the Analog Devices channel (<http://jmlinks.com/13b>). Watch a playlist of their videos from the Embedded World Trade Show at <http://jmlinks.com/1t>. Essentially, they are taking a video recorder to the trade show, and recording the "dog and pony show" that each product marketing engineer gives to a prospect who walks up to the trade show booth. The dance goes like this:

- *Hi, what does Analog Devices have new and exciting for engineers that you're exhibiting at the Embedded World Trade show?*
- *Oh, hi there, my name is John Doe, Product Marketing Manager at Analog Devices of the super widget. Let me walk you through what we're exhibiting.*
- *Thank you. (Mentally: oh that's interesting, that fits what I need, he seems like a nice guy, and they seem like a great company... I'll follow up on doing business together after the show).*

By posting these videos to YouTube, Analog Devices creates linkable, sharable **content**, that it can post to its Facebook, Twitter, LinkedIn, and even website pages. It can also email these videos out to prospective clients who inquire but were unable to attend the industry trade show. They are using video to **support** their marketing efforts, and none of these videos are designed to "go viral" like a cat video or Rihanna's latest over-the-top music video. That's not their purpose.

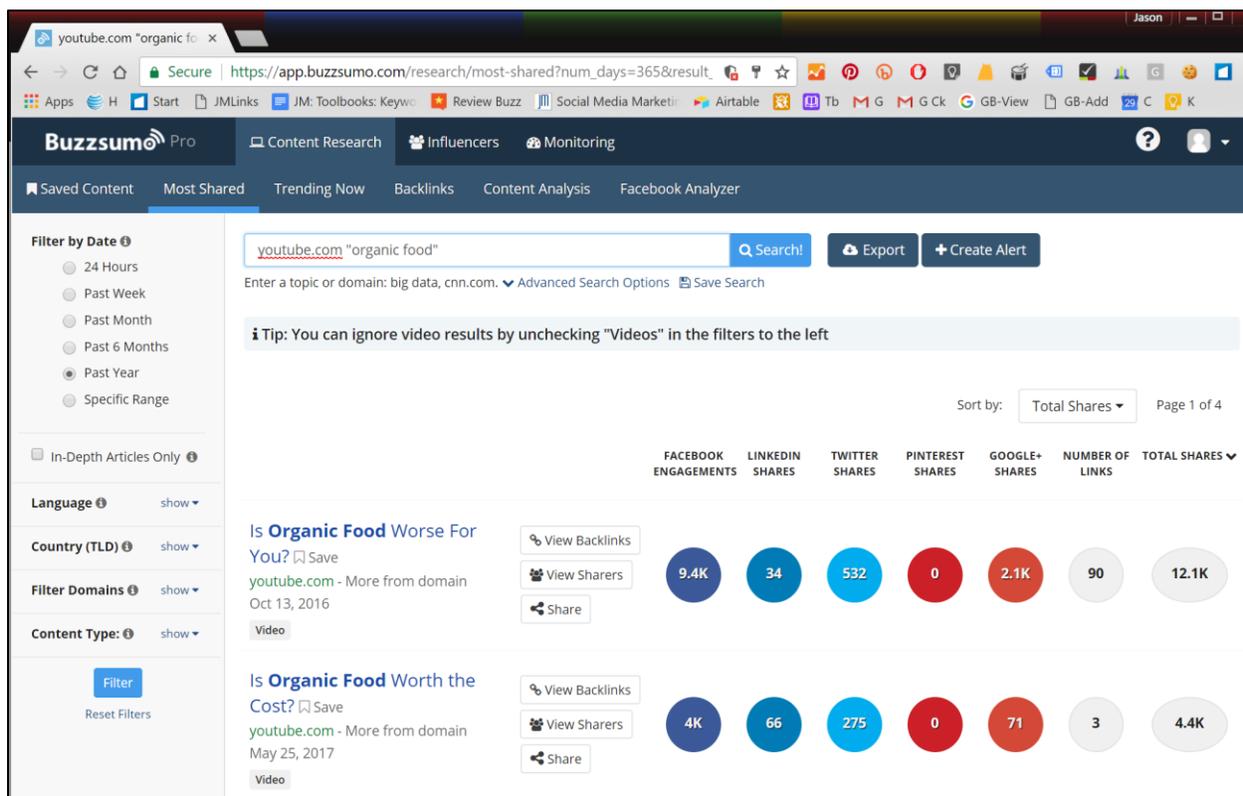
Analog Devices' use of YouTube is all about **quality**: using YouTube to reach highly qualified, target customers not to create massive view counts.

A third way to see the supportive use of video is to go to Facebook, and look at brands you admire. You'll often see them sharing video content. Use a tool like Buzzsumo (<http://www.buzzsumo.com/>), enter your keywords, and look for videos that are being shared on social media. In most cases, these videos are functioning to “support” the social media marketing: like blog posts, videos can be simply content that you share.

Buzzsumo is \$99 / month, but it's worth trying it for just a month to see what YouTube content is popular. To do so, log in to Buzzsumo, then type:

*youtube.com your keywords*

It's a good idea to use quotes around a phrase. Here's a screenshot of a Buzzsumo search for youtube.com “organic food” showing that #1 most popular YouTube video in the last year:



This shows that the video “Is Organic Food Worse for You” on YouTube had 9400 shares on Facebook, 34 shares on LinkedIn, 532 shares on Twitter, and 2400 shares on YouTube. Its view count stands at 1.3 million. You can watch it at <http://jmlinks.com/32g>.

**Tip.** Look for videos in your industry with high share counts, thumbs up, comments, and shares as indicated on YouTube itself at the video level and via third-party tools like Buzzsumo. Even if your goal is only to use video to support your website, you want to research what type of content engages your customers and produce accordingly.

If you sell something complex, something that people use “emotional intelligence” to evaluate, video allows you the opportunity to share that information quickly and easily. If you have “how to” content that is best explained visually, videos can be fantastic for your social media marketing. Any type of content that is better explained by “showing” than by “writing” is an excellent candidate for video. You can also, of course, use video for “after the sale” events such explanations to commonly asked technical support questions.

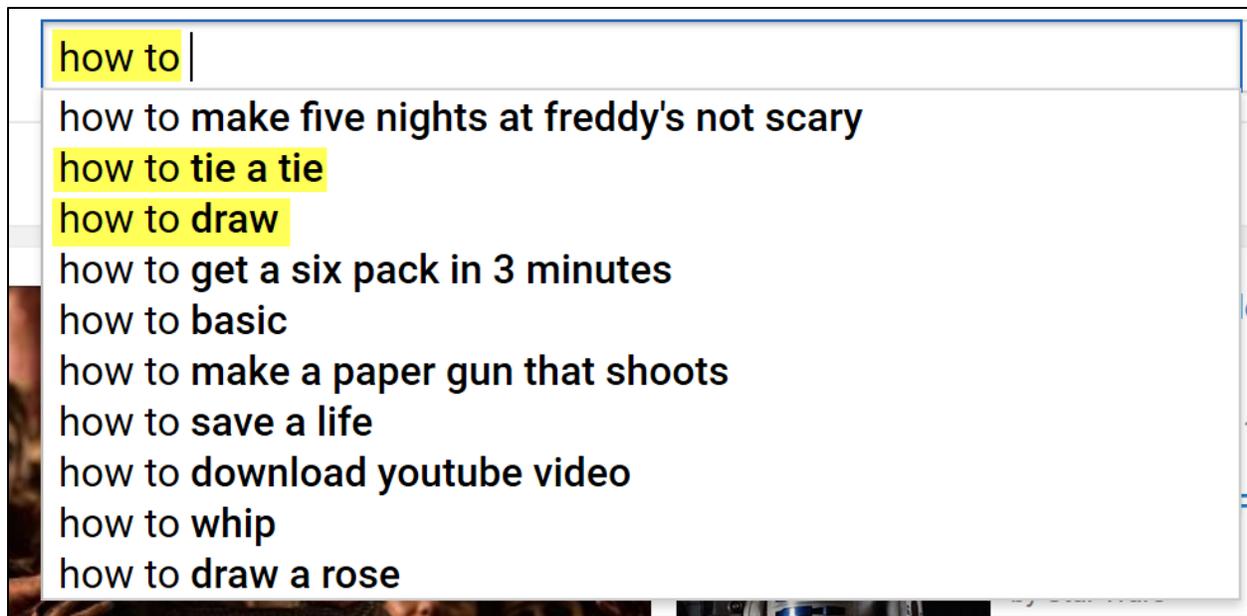
The **supportive** use of video, with free hosting of those videos on YouTube and a universal player, is an opportunity not to be missed!

**VIDEO.** Watch a video tutorial on the three uses of YouTube (supportive, SEO, and sharing / viral) at <http://jmlinks.com/16z>.

## **#2 Use of YouTube: Search Discovery or SEO Use of Video**

YouTube is the No. two search engine, behind Google and far ahead of Bing. One of the heaviest uses of YouTube is for “how to” searches. Simply go to YouTube and start typing “how to” and you’ll see a list of common YouTube searches.

Here’s a screenshot:



If your company has any type of “how to” content, especially “how to” content that is best explained in a visual way, you can SEO-optimize YouTube videos to show up for search.

Let’s say, for example, that you sell pet food. People who have new puppies are often curious about how to potty train their new puppy. So they’ll Google or search via YouTube “How to potty train a puppy.” Presto! You now have an idea for an informative video, and in that video you can embed mentions, and links to your website for more information and products to buy. Or let’s say that you sell makeup. People are dying to know the best way to put on mascara. So they search “How to put on Mascara.” Here’s a screenshot of common “how to” searches with makeup:

how to put on

how to put on **fake eyelashes**

how to put on **eyeliner**

how to put on **makeup for beginners**

how to put on **makeup**

how to put on **eyeshadow**

how to put on a **tampon**

how to put on a **tie**

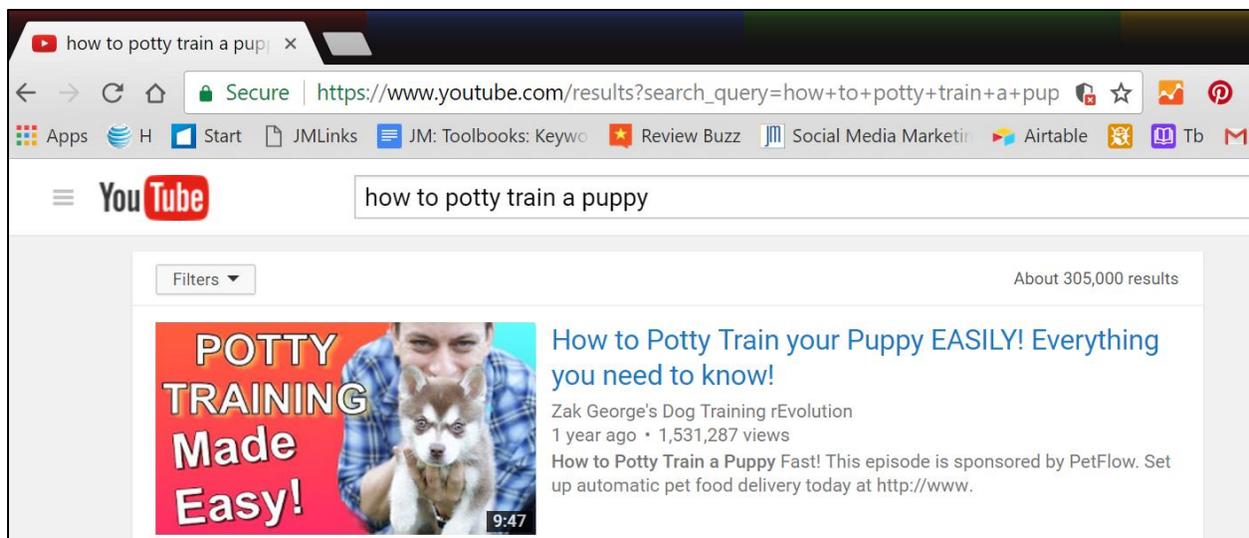
how to put on **lipstick**

how to put on a **wig**

how to put on **mascara**

So your first step is to do some keyword research. What types of searches are people making on YouTube that are relevant to your product or service? Use “YouTube suggest” by simply typing keywords into YouTube and paying attention to what people enter (this is driven, largely, by keyword search volume). Use a tool like Ubersuggest (<https://ubersuggest.io/>) which will pull all the “suggestions” from Google. And use the Google keyword planner tool (<http://jmlinks.com/1u>) to identify high volume, high value keyword searches on Google (which generally also translate to YouTube). For a video on how to use the Google Keyword Planner, visit <http://jmlinks.com/1v>.

A video channel that is 100% built around “how to” searches is *Zak George’s Dog Training rEvolution* at <http://jmlinks.com/13c>. Notice how each of his videos is optimized for searches that puppy and dog owners do to learn “how to” train their dogs. Here’s Zak’s video in the #1 spot for “how to potty train a puppy”:



In a similar way, if your company, service, or product touches on something that customers are eager to learn “how to” do, then create videos on these topics and optimize them for relevant keywords.

### **Branded Keywords: Your Competitor Names**

As for keywords, also pay attention to very specific branded searches. If a competitor has a hard-to-use product, and you know that people search YouTube for that product, you can include that product name in your video headline, to snag viewers who are searching for the product. Identify adjacent, branded search terms and snag that traffic to your own videos. For example, a YouTube search such as “Netgear router set up” or “How to use a Black and Decker drill” are ripe for this type of adjacent keyword optimization.

**VIDEO.** Watch a video tutorial on the three uses of YouTube (supportive, SEO, and sharing / viral) at <http://jmlinks.com/16z>.

### **Optimize Your Video via SEO for YouTube**

Once you’ve identified keywords that people search on Google and/or YouTube, looking for video content, it’s time to optimize your video using that tactics of Search Engine Optimization or SEO. Here’s what to do:

1. **Create Your Video.** Obviously, you have to create a short, informative video that explains “how to” do what people are looking to understand. It should be primarily informative, but showcase your product or service nonetheless.
2. **Optimize the Video Title.** Write a keyword-heavy video title.
3. **Optimize the Video Description.** Write a keyword-heavy video description and include a link in http:// format to your website for more information.
4. **Optimize the Video Transcript.** YouTube pays attention to what you “say” in the video via voice recognition software, so be sure to “say” the keywords when you are presenting. For example, “In this video, I am going to explain how to tie a tie.”
5. **Optimize the Video Tags.** When you upload the video, be sure to use no more than five keyword-relevant tags.

**Tip.** It’s a best practice to have your keyword-heavy content ready to go upon upload, as the first indexing by YouTube is the strongest. Don’t upload first in a temporary version, and come back later to optimize.

Here’s a screenshot of Zak’s “How to Potty Train Your Puppy” video:

The screenshot shows a YouTube video player interface. At the top, the browser address bar displays the URL <https://www.youtube.com/watch?v=7vOXWCewEYM>. The search bar contains the text "how to potty train a puppy". The video player shows a man holding a small puppy. Below the video, the title is "How to Potty Train your Puppy EASILY! Everything you need to know!". The channel name is "Zak George's Dog Training rEvolution" with a "Subscribe" button and "824K" subscribers. The view count is "1,532,459 views". Below the video, there are icons for "Add to", "Share", and "More". The video was published on Feb 21, 2016, and the description starts with "How to Potty Train a Puppy Fast!".

Notice how the video title and video description both contain the exact phrase “How to Potty Train \* Puppy.” It’s obvious that the video regurgitates to YouTube the target keyword phrase.

### Learn “How To” Optimize a YouTube Video

Take a look at the following “how to” searches, and browse the top-ranked videos to confirm how they optimize their video titles and descriptions:

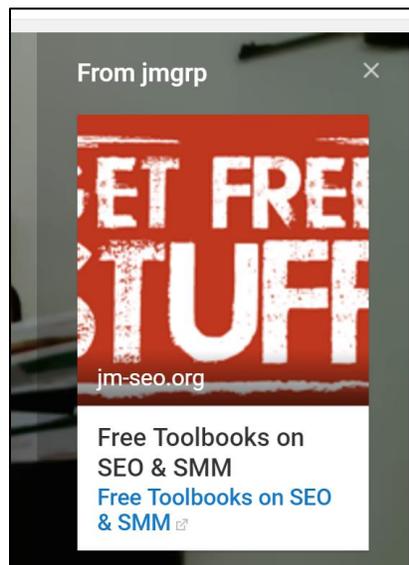
- How to Put on Eyeliner at <http://jmlinks.com/1w>
- How to stop a puppy from chewing on a leash at <http://jmlinks.com/1x>
- Living wills and advanced directives at <http://jmlinks.com/1y>.

It's easy to optimize the video headline, description, and tags (not visible to the user). That's your first step.

Next, you need to think about **interactivity**. In rewarding videos with top search positions, YouTube pays a lot of attention to how many views a video has and how interactive a video is, similar to the way that Facebook rewards posts that have high Edgerank. You want users to “interact” with your video: thumbs up / thumbs down, comment, share, and embed. How do you get high video counts and high interactivity?

- **Ask.** In your video, ask users to “subscribe to your channel,” or “thumbs up” if you like the video, or “enter questions in the comments below.” You can drive interactivity simply by asking for it.
- **Cards and End Screens.** “Cards” (see <http://jmlinks.com/31z>) are clickable popups in a video that can lead to actions such as links to your website. “End screens” (see <http://jmlinks.com/31y>) allow you to recommend other videos, playlists, and a call to subscribe to your channel at the end of a video.

Here's a screenshot of a video card:



To see it in action, watch the video at <http://jmlinks.com/32a> and click on the “i” on the top right of the screen. If you pay attention while watching the video, you’ll see that when the YouTube card first appears it “pops out”: a message.

You can create clickable links to other videos as well as to the subscribe feature, and you can create messages to users that ask for interactivity. For the official YouTube help article on creating a custom subscribe button for your videos visit <http://jmlinks.com/32b>.

**VIDEO.** Watch a video tutorial on cards, annotations, and overlays on YouTube videos at <http://jmlinks.com/17b>.

## Advertising and Overlays on YouTube

YouTube advertising, especially on search keywords, can be very cost effective (More on this in a moment). YouTube rewards videos with high view counts in its organic search, so by first *advertising* a new video you can drive up the view count, thereby helping it show for free in the organic results.

Here’s a nifty trick. You can turn “on” advertising for a video, and then immediately “pause” it to spend zero dollars. However, once advertising is enabled for a video, YouTube allows a **call-to-action overlay**, which is another type of clickable link in a video.

*These overlays show on the video on all times, including when it is being viewed or found organically.*

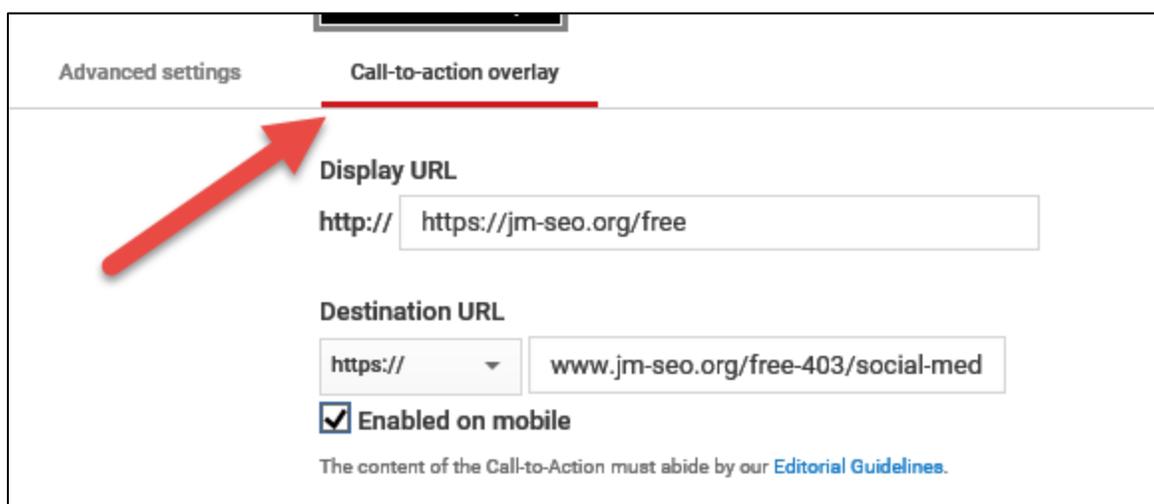
To set up a call-to-action overlay, first turn “on” advertising of the video in AdWords. Then create a “video ad” for your video. Next, fill in the overlay information. Finally, set a very low budget such as \$1.00 per day per 10 videos. Presto! All of your video views, including those that originate from organic (non-advertising) searches, will have overlays. In short, once a video is being advertised via Google AdWords, the overlay function is turned on, *regardless of how small the budget being spent.*

Once you are advertising a video via AdWords, this “call to action” overlay feature is turned on (though it can be a little hard to find).

Here's a screenshot of it in AdWords:



And here's a screenshot of the "call to action" inside of YouTube's Video Manager:



Third, you'll need to think about external **promotion**. Since YouTube pays attention to the **view count** (*higher is better*) as well as interactivity, use your other social networks to promote your video. Post your video to Facebook, Twitter, LinkedIn, etc., email your video link out to your email link. Even consider advertising the video upon launch on YouTube (<http://jmlinks.com/13d>), to drive the view count up as well as the interactions. "Embeds" of your video (when your video is embedded or linked to from an external website) are also important to drive a video to the top of search. The more views of your video, the more embeds of your video across the Web, the higher it will rank in relevant YouTube and Google searches.

# CREATE A VIRTUOUS CIRCLE: THE MORE A VIDEO IS VIEWED, THE MORE IT SHOWS IN SEARCH

The on page text optimization of the video, interactivity, and external promotion all drive a video to the top of YouTube. Once on the top of YouTube search, a **virtuous circle** can kick in: the more it shows at the top of YouTube search, the more people watch it, the more they watch it, the higher the view count and interactivity, which drives it higher on search and so on and so forth.

## #3 Use of YouTube: Sharing and Viral Videos

Videos are one of the most shared content across social media. We've all seen compelling videos, and shared them across Facebook, Twitter, or LinkedIn. Videos are highly shareable! Why? Largely because video can convey **emotional content** in a much easier way than can text or images. And emotion drives sharing: funny, shocking, provocative, outrageous – any of the big human emotions are the ultimate driver of sharing across social media.

## VIDEOS GET SHARED BECAUSE OF EMOTIONAL CONTENT

If you have a product or service that people do not heavily search for, then you can attempt to leverage the share path via YouTube. How? First and foremost, identify a logical **emotion** to drive the shares. *Utility* is one emotion, in the sense that people will share a video that is useful with friends of family. For example, a video on “how to make your Facebook completely private” (<http://jmlinks.com/1z>) has over 2.4 million views. So

creating something so useful that people share it with friends and family is one way to leverage YouTube sharing to promote your product.

But utility is the weakest of human emotions. **Fear, anger, outrage, humor** – all of these emotions are much, much stronger than mere utility!

For most businesses, the best emotion to tap is **humor**, because humor can encourage sharing without having negative side effects on your brand image. One business that has really leveraged YouTube sharing is Blendtec Blenders (<http://www.blendtec.com/>). Their YouTube channel, entitled, “Will it blend” (<http://jmlinks.com/36v>) is all about taking crazy items and blending them in their powerful blenders: being humorous and yet showcasing their product. One of my favorite viral videos produced by Blendtec concerns Justin Bieber, with over 3.6 million views. Watch it at <http://jmlinks.com/2a>.

If you can connect your product to something insanely funny, then you can use humor as the “fuel” to drive social sharing of your product or service. Just remember it has to be insanely funny. Other examples are “Girls don’t poop” (<http://jmlinks.com/2b>) or “The man your man could smell like” (<http://jmlinks.com/2c>). For the latter, I recommend you read the Wikipedia discussion at <http://jmlinks.com/2d>, where you’ll learn that “behind the scenes” an immense amount of work and promotion went on to make the video “go viral.”

## Going Viral

To “go viral,” a video must be so highly shared that one person shares it with two, and the two share it with four and so on and so forth. For a video to go viral, it must have strong emotional pull, and to get started, must usually have strong external promotion including advertising.

*It takes a match to ignite a forest fire, after all.*

**Humor** is one emotion that can start viral sharing. Another is **sentimentality**. Especially for non-profits, videos that tug on the emotions can be used to encourage social sharing. Examples of this strategy are “Dear 16 Year Old Me” (<http://jmlinks.com/1p>), “Dear Future Mom” (<http://jmlinks.com/2e>), and “Always #LikeAGirl” (<http://jmlinks.com/36s>) These videos feature real people, sharing authentic emotional stories about a social cause or problem. People share them to “support” the cause. The “Ice bucket challenge” and “It gets better” are other examples of this use of “showing support” to promote a cause.

Finally, I want to draw your attention to Mike Tompkins (<http://jmlinks.com/13e>) as an example of a marketer who leverages viral sharing via YouTube. Tompkins produces “covers” of pop songs on YouTube, such as his first video on Miley Cyrus “Party in the USA” (<http://jmlinks.com/2f>). The strategy is to “piggy back” on popular YouTube searches for “branded content” (e.g., “Party in the USA” or “Party in the USA cover”) and then “hijack” users to his own wonderful videos. Then, users “subscribe” to his channel, and he has a promotional vehicle combining YouTube search and viral sharing, because his videos are strong and innovative enough to be shareable in their own right.

*It's not search OR share on YouTube: it's search AND share.*

Indeed a video such as Tompkins’ “Starships” (<http://jmlinks.com/2g>) is leveraging search, share, and the use of influencers (the cast of Pitch Perfect) to promote it and get it to “go viral”). Similarly, the “It gets better project” (<http://jmlinks.com/36t>) is leveraging influencers, sentimentality, user generated content, and a “cause” that many people agree with to get its videos to “go viral” and spread its message.

### **Always #LikeAGirl**

Let’s return to one of my favorite viral videos, “Always #LikeAGirl.” This is an excellent example of a viral video that has an ulterior marketing motive. Always (the feminine product manufacturer) commissioned a video about stereotypes, and cleverly entitled it, “Always #LikeAGirl” (<http://jmlinks.com/32c>). (Note the insertion of their brand name and the #hashtag – clever marketing, no?) Please take a moment and watch this incredibly powerful and thought-provoking video; as a consumer. I guarantee it will make you think deeply about the societal messages we embed into young girls. As a father of two girls, it certainly made me think!

But then, “reverse engineer” this video as a marketer. If Always had created a video about tampons or pads, it wouldn’t have exactly been an award-winning, viral video. Pretty boring and not exactly a topic people would share. So clearly Always brainstormed a message that blended into its corporate brand, touched on women’s issues, and had the potential to go viral by being emotional and counterintuitive. The brand message (*buy Always products*) takes a back seat to the socially conscious message about our prejudices concerning what it means to run “like a girl.”

In an effective **viral video** for a corporate brand, the brand message isn't in the *foreground*. It's in the *background*.

As a marketer, the task is to “reverse engineer” these efforts at sharing and virality and determine if there is a path to viral marketing that *fits your company*. Again, for most for-profit companies, the best emotion is humor, while for many non-profits, sentimentality and causes that people actively support are good mechanisms to spur social sharing. If you can identify a potential concept for a viral video for your company, product, or service, I recommend you watch this YouTube video on “Why Storyboard?” at <http://jmlinks.com/32d>. Before you invest blood, sweat, tears, and budget into an attempt to “go viral,” first storyboard your video and test market it.

### **Which of the Three YouTube Strategies Will Work for You?**

To summarize, identify which of the following strategies on YouTube are most relevant for your company:

**Supportive.** Create and upload videos that support your website and other social media. This is largely using YouTube as a hosting platform as opposed to a promotional system.

**Search / SEO.** To the extent that people search for keywords near your product or service, you can optimize your videos for discovery by search.

**Share / Viral.** To the extent that your videos have an emotional content, you can encourage discovery by social sharing and even virality.

Remember that in all cases you usually need to use external promotion tactics such as sharing your videos on Facebook, Twitter, and LinkedIn, reaching out to influencers who will help promote your videos, and even advertising on YouTube to extend the reach of your videos.

**VIDEO.** Watch a video tutorial on the three uses of YouTube (supportive, SEO, and sharing / viral) at <http://jmlinks.com/16z>.

## » EXPLORE FACEBOOK AS AN ALTERNATIVE

Facebook is keen to become the #2 player in video, but the way that video works on Facebook leverages only the “supportive” and “share/viral” use of video. Don’t think of Facebook video as an *alternative* to YouTube but rather as a *complement*.

Conceptually, here are the two marketing paths to video success on Facebook:

**Supportive.** Upload your video directly to Facebook as a “native” video. Facebook is friendlier to native videos (vs. videos on its nemesis, Google / YouTube). For this reason, your organic reach will be better with a native video than with a YouTube video on Facebook.

**Share / viral.** A video on Facebook can be shared or even go viral. As with YouTube, it’s the emotional videos that get a lot of shares or go viral on Facebook. Again, because Facebook favors its own videos, you will get better organic traction with a native video. In addition, you can advertise the video more effectively via Facebook advertising.

But don’t think of videos on Facebook / YouTube, in *either/or* terms but rather *both/and* terms. Because of the nature of Facebook, video content on Facebook ramps up rapidly and then withers away over time. Facebook, unlike YouTube, isn’t a storage repository for video, nor does it have the SEO / discovery use of video. Accordingly, you might think of launching your video simultaneously on Facebook AND YouTube, but then on the long term, nurturing only the YouTube version as an “evergreen” video.

**Facebook Video.** Best at short-term, on launch use. Also has “live” video capabilities. Facebook is also much more powerful for “live” videos that “go viral.” (Learn more about Facebook live at <http://jmlinks.com/36w> and YouTube live at <http://jmlinks.com/36x>).

**YouTube Video.** Best at long term, evergreen use; also, YouTube is platform agnostic, in that you can easily share across all social media. Has “live” video capabilities, but the reality is that this is a very, very distant second to Facebook live.

In fact, you can do both YouTube and Facebook video. You can promote both the “Facebook native” and “YouTube native” versions of the same video on Facebook. To learn more about video on Facebook, visit <http://jmlinks.com/32e>.

## » ADVERTISE ON YOUTUBE

YouTube, seeing as it is part of Google, offers robust advertising options. (See <http://jmlinks.com/32f> for the official guide to YouTube advertising). To create a video campaign, you’ll need an AdWords account, preferably linked to your YouTube account. Next, login to AdWords (<https://adwords.google.com/>). Note: we’ll use the “traditional” AdWords interface in the examples below. If you’ve been “upgraded” to the “Beta” AdWords format, click on the three dots at the top right of your screen and click “Return to previous AdWords.”

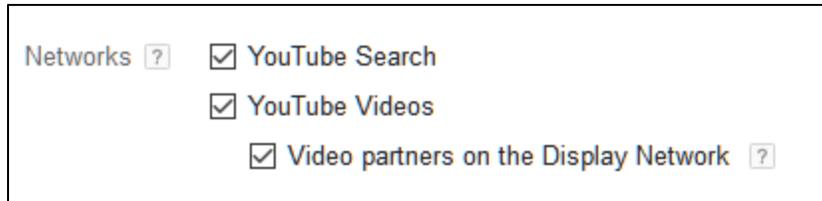
Next, click the red *+Campaign* button. Then select *Video* as the Campaign type. Next, give the Campaign a name and select *Standard*. Then select either *In-stream or video discovery ads* (most advertisers), or *Bumper ads* (big brands with big budgets, only). Set your budget.

In delivery methods, check one and ONLY ONE of the following methods. Your choices are:

**YouTube Search:** this means that users are pro-actively **searching** YouTube by entering keywords into YouTube to find your ad. (**Note:** because of problems with inappropriate content, Google has severely restricted this feature as of October, 2017, but promises to bring it back online “soon”).

**YouTube Videos:** this means that users are *browsing* YouTube to watch videos, and you want to place your videos “on top” of other videos.

Uncheck the box Video partners on the Display Network. (the Google Display Network is problematic and full of scams and soundrels, so I recommend you do not use it). Here’s a screenshot:



## Location Targeting in YouTube

You can geotarget on YouTube! For example, a *Cat Boarding Emporium* in San Francisco could target people watching “cat videos” who also live in San Francisco. Or a pet store could target people watching videos on dog and puppy training who live in Oakland, Berkeley, or El Cerrito, California.

# LOCATION TARGETING WORKS IN YOUTUBE

Geotargeting makes it easy to get your ads right to people near your local business, and is one of the most exciting features in YouTube advertising. Accordingly, select your Geotarget (e.g., United States, or drill down to a specific city or state).

## Mobile Bid Adjustment

You can also control your mobile bid adjustment here, if you do / do not want to run on phones and/or tablets. It will force you to create an Ad Group, but you can click “Cancel” if you’re not ready to do that just yet.

Once you’ve created a Campaign, you can return to these settings, of course, by clicking the Settings tab at the top.

## Setting up Your Video Ad

Now, you’re ready to set up your video ad. Have your YouTube URL handy. Find your video on YouTube by searching for it, and then copying the URL. It should look like this:

**<https://www.youtube.com/watch?v=99oLPkmHYJo>**

Assuming you've set up an Ad Group to "store" your video ad, click on that Ad Group first in the left column. (Remember, ads "live" in Ad Groups, and Ad Groups "live" in Campaigns). Then click on the Ad tab and click on the red +Ad button. Paste the URL of your video into the box. It should then "find" your video and show your thumbnail. Under Video ad type, select "Drive views, awareness, or conversions." Next, if you've chosen *YouTube Search* at the Campaign level, then you should ONLY see available "Video Discovery Ad." If you've chosen "YouTube Videos," then you'll see *In-stream ad*.

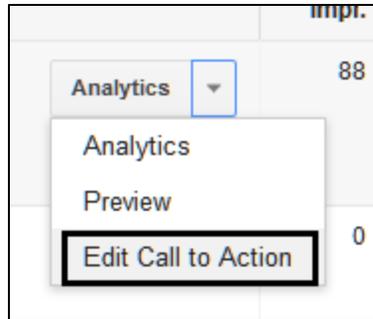
Here's what these two options mean:

**YouTube Search** (*Video Discovery*). If your ad is Video discovery, **this means users will see it when they search by keywords on YouTube**. Fill out the Headline, Description 1, and Description 2 fields. I recommend that you choose "The video's watch page on YouTube" unless you have a very robust Channel. Give the ad an easy-to-understand name (visible only to you). (This is very similar to creating an ad in AdWords proper.)

**YouTube Videos** (*In-stream Ad*). If you've selected YouTube Videos at the Campaign level, then choose *In-stream* as the ad format. **This means that your video will play BEFORE other videos on YouTube**. Enter the Display URL (your website landing page) and the Final URL as indicated. Enter your bid as a CPV (cost per view). In this format, you can select *Demographics and/or Interests* (which we will discuss below) as your targeting method.

## Call-to-Action Overlays

Note: once you've created an ad for a video, the Call-to-Action (CTA) Overlay feature will become available. You can find this on AdWords by clicking into the Video tab, finding your video, and then clicking on the *Analytics > Edit Call to Action* tab. Here's a screenshot:



You can also edit Call-to-Action overlays on your YouTube channel by logging into your Channel and then clicking on *Creator Studio > Video Manager*. Then click on *Edit*, and you should see the *Call-to-action overlay* on the far right. Here's a screenshot:



Note: CTAs disable video cards (and vice-versa), so you have to choose one or the other. YouTube is clearly moving towards video cards, so you'd probably be best served by enabling cards (which are also easier to set up).

### **Trigger Your Ad: Video Targeting**

Now that you've inputted your ad to YouTube, it's time to dive into targeting options. Targeting "lives" at the Ad Group level, just as in regular AdWords. Click on the Video targeting tab in YouTube. Google being Google, the interface is INCONSISTENT with regular AdWords.:

**Demographics.** No targeting available.

**Interests** (In-stream Ads, only). Click on the red *+Interests* to target by interest. Here, you'll recognize targets from the Display Network such as Affinity audiences, In-market audiences, and Custom affinity audiences.

**Remarketing** (In-stream Ads, only). Here you'll see Video remarketing lists (useful if you have a pretty popular channel), or you can select AdWords remarketing lists to see your AdWords remarketing lists, here.

**Placements** (In-stream Ads, only). Here you can add individual videos or YouTube channels that you have found. NOTE: they MUST have monetization enabled for this to work; check out the video or channel, and make sure that you see ads already there. Otherwise, it won't work, even though YouTube will act "as if" you can advertise on top of the video.

**Topics** (In-stream Ads, only). Again, similar to the regular Display Network. These are "bigger bucket" categories of user interests.

**Keywords** (both Video Discovery and In-stream Ads). Especially if you are targeting video discovery, enter very specific keywords here (the ones that your target customer is searching on YouTube). **IMPORTANT:** unlike regular AdWords, add QUOTE MARKS around ALL keywords to be specific (not plus signs), so you'd add "cat boarding" not *+cat +boarding* or *cat boarding* here. This is true even for a one-word keyword like "probate". If you add anything OTHER than quote marks, YouTube will "think for you" in terms of keywords and run your ad on all sorts of non-related keywords. (**Note:** because of problems with inappropriate content, Google has severely restricted this feature as of October, 2017, but promises to bring it back online "soon").

Bids on YouTube are set as your maximum CPV (Cost Per View) not CPC (Cost Per Click). There is no tool to my knowledge to know what a good CPV is, so bid high to begin with and then lower your bid over time. You do not pay per click on YouTube, but rather per video view. Remember: you can change your Settings at the Campaign level, including geotargeting, so conceivably you could target only people in San Francisco who are watching cat videos on YouTube.

**VIDEO.** Watch a video from Google on how to set up YouTube ads in AdWords at <http://jmlinks.com/26r>.

## » EVALUATE YOUR YOUTUBE ADVERTISING PERFORMANCE

Once your ads are up and running on YouTube, evaluating the performance is similar to the rest of the Display Network. Click on the Video Targeting tab at the Ad Group level. Then click:

**Demographics** to see age, gender, parental status, and household income (if available).

**Interests** to see available interests data.

**Remarketing** to see which remarketing list(s) they came from.

**Placements** and then *Where ads were shown* to see which videos / channels ran your ad.

**Topics** to see topics.

**Keywords** and then *Search Terms* to see the actual search terms entered into YouTube.

You can also go into Google Analytics to view clicks coming from YouTube to evaluate what happens “after the click.” To do this, create a Segment by clicking on the *Segments* tab in Google Analytics, and then *Custom*, and source as *YouTube.com*.

**VIDEO.** Watch a video on how to set up Segments in Google Analytics at <http://jmlinks.com/25p>.

Returning back to your YouTube Channel (not AdWords, and not Google Analytics), you can go to *Creator Studio > Analytics* and then drill down into an individual video to see key performance indicators such as watch time.

## » MEASURE YOUR RESULTS

Owned by Google, YouTube provides very good metrics on both your channel and your videos. From inside your YouTube account, click on *Creator Studio > Analytics*. Next, you can drill down to any video, and investigate:

**Views.** Total views and views over time.

**Estimated Minutes Watched.** Total minutes watched.

**Engagement.** Variables such as likes, dislikes, comments, shares, videos in playlists, and subscribers generated by the video.

**Demographics.** Your top countries and gender distribution.

**Discovery.** How people found your video. Click into “top traffic sources” to view the actual search keywords, “external” to view referrer websites, “suggested videos” to view related videos that generated traffic

You can also manage your user comments from insider Creator Studio. Click on Community > Comments to view, respond, and even delete comments from users.

## Google Analytics

For many of us, we want to drive traffic from YouTube to our website, even to our ecommerce store or to download a free eBook or software package to get a sales lead. Sign up for Google Analytics (<https://www.google.com/analytics>) and install the required tracking code. Inside of your Google Analytics account on the left column, drill down by clicking on *Acquisition > Social > Overview*. Then on the right hand side of the screen you’ll see the word “Social.” Click on that, and then find YouTube on the list, and YouTube to your Website, giving you insights into what types of video people find attractive.

You can also create a custom Segment to look at only YouTube traffic and its behavior. For information on how to create custom Segments in Google Analytics, go to <http://jmlinks.com/1f>. For the Google help files on Segments go to <http://jmlinks.com/1g>.

In sum, inside of YouTube you can see how people interact with your channel and videos. Inside of Google Analytics, you can see where they land on your website and what they do after they arrive.

## »» CHECKLIST: YOUTUBE ACTION ITEMS

Test your knowledge of YouTube! Take the *YouTube marketing quiz* at <http://jmlinks.com/qzyt>. Next, here are your YouTube **Action Items**:

- Research** whether your customers (and competitors) are on YouTube. Start with keyword searches on YouTube. What videos seem to be engaging? Which videos generate the most interaction, including shares? Why?
  - Brainstorm** for your company / industry, which type(s) of videos make the most sense:  supportive  search / discovery and/or  viral / sharing.
  - Consider **Facebook** as an alternative for video. This might be that Facebook is a better venue where your customers “hand out,” or it might be that live video is better for you on Facebook. Or not – just consider Facebook as the #2 social media site for video.
- Set up your **company channel**. If you see opportunities on YouTube, set up your company channel, including profile picture, cover photo, the “about” section, and at least one video explaining what you do and who should care.
  - If you have more than one video, consider an “**unsubscribed trailer**” that answers the question of why they should subscribe to your channel.
- Promote** your **video(s)** through SEO (Search), cross-promotion on your other social channels, the real world, and even advertising on YouTube.
- Measure** your **results** in ways such as video views, thumbs up / down, comments as well as the growth of your Channel subscribes. Use YouTube cards or call-to-action overlays to send traffic from YouTube to your website, and measure conversions such as sales that originate in YouTube.

Check out the **free tools**! Go to my *Social Media Marketing Dashboard > YouTube* for my favorite free tools on YouTube. Just visit <http://jmlinks.com/smmdash>.

## »» DELIVERABLE: A YOUTUBE MARKETING PLAN

Now that we’ve come to the end of our chapter on YouTube, your **DELIVERABLE** has arrived. Go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code ‘**2018social**’ to register if you have not already done so), and click

on the link to the “YouTube Marketing Plan.” By filling out this plan, you and your team will establish a vision of what you want to achieve via YouTube.



# 8

## PINTEREST

Some social media like Facebook, YouTube, and LinkedIn are broad, reaching many people with many diverse interests. Others are narrow, reaching only specific people (demographic groups like *young people* or *women*, for example) or specific usages (e.g., *plumbing*, *restaurants*, *dentistry*, etc., for example). Yelp, Tumblr, Instagram, Twitter, and Pinterest fall into this latter category. They are very strong in the niches, but not so strong in the generalities. If your specific customer segment or usage is active on the particular social media, it works wonders. If not, not.

Pinterest is such a platform: incredibly strong in **online shopping** and the **female demographic**, and all but absent from nearly everything else. It's also extremely relevant for "**visual social bookmarking**."

Pinterest focuses its marketing strengths on three intertwined segments: **consumer retail**, **do-it-yourself**, and **women**. Shoppers use Pinterest to browse the Internet and "pin" items they might want to buy to "boards." Do-it-yourselfers use Pinterest to share ideas on how to build this or that, knit this or that, or construct this or that. Women, always a heavy shopping demographic, have been the early adopters of Pinterest both as a "buying / idea platform" and as a great platform for do-it-yourself crafting and recipe-sharing.

Pinterest, in short, is *the* network for consumer retail, *the* network for crafty do-it-yourself including recipes, and *the* network for women (especially in shopping mode).

**Let's get started!**

## To Do List:

- » Explore How Pinterest Works
- » Inventory Companies on Pinterest
- » Set up and Optimize Your Account
- » Brainstorm and Execute a Pinning Strategy
- » Promote Your Pinterest Account, Boards, and Pins
- » Measure Your Results
- » » Checklist: Pinterest Action Items
- » » Deliverable: A Pinterest Marketing Plan

## » EXPLORE HOW PINTEREST WORKS

For a basic introduction to Pinterest, I recommend you check out the official guide to Pinterest at <http://jmlinks.com/36z>. Next, in terms of marketing opportunities, the best way to understand Pinterest is to grasp the concept of an **idea board**. Imagine a virtual corkboard in the Internet cloud to which you (and others) could “pin” sticky notes, photos, videos, and other content around a theme.

Let’s use the example of someone planning out her ideal dorm room for freshman year at college. First, she signs up for Pinterest and creates a profile. Compared with Facebook, Pinterest is very basic: not a lot of information is displayed in a Pinterest profile, pretty much just a profile picture and a very brief description. Next, she should download and install the Pinterest button (see <http://jmlinks.com/2m>) or Chrome Pinterest extension (see <http://jmlinks.com/2n>). Once installed, she can now surf the Web (or use the Pinterest app for iPhone or Android) and “pin” interesting items to “boards” that she sets up.

For example, she’d set up a board called “my dream college room” or even more specific boards like “my dream bathroom supplies,” or “my dream desk.” Let’s say she goes to Amazon and finds an amazing desk light. She can “pin” this desk light to her “dream desk” board. People who follow her (or this board) on Pinterest, thus see this desk light in their Pinterest news feed, whereupon they can comment on it and (*gasp!*) and even buy it for her. And of course, she would pin not just one desk light, but several possible desk lights, several pencil holders, several ink pads, a few art posters for above her desk, and on and on. It’s as if she’s building a collage of desk possibilities, from which she can select the

perfect accessories. As she creates idea boards for her dream desk, dream closet, dream door room, and dream bathroom supplies, she can invite her friends, her Mom, her sorority sisters to collaborate by commenting and pinning to the boards as well. Pinterest, in short, is a visual bookmarking and idea board system, one that can be social as well, and one that makes online shopping as easy as discover, click, buy. People also use it before purchase in the real world, as a social scrapbook to group together products and services they might want to buy at a brick and mortar store. And do-it-yourselfers use it to share ideas about how to build this or that, how to cook this or that.

## THE ESSENCE OF PINTEREST IS THE IDEA BOARD

The structure of Pinterest in a nutshell is:

**Individual profile:** me, Jason as a person.

**A board:** collections of items from the Web on topics like my “dream dorm room,” “dog toys to possibly buy,” “do-it-yourself Christmas decorations,” or “recipes for summer parties.”

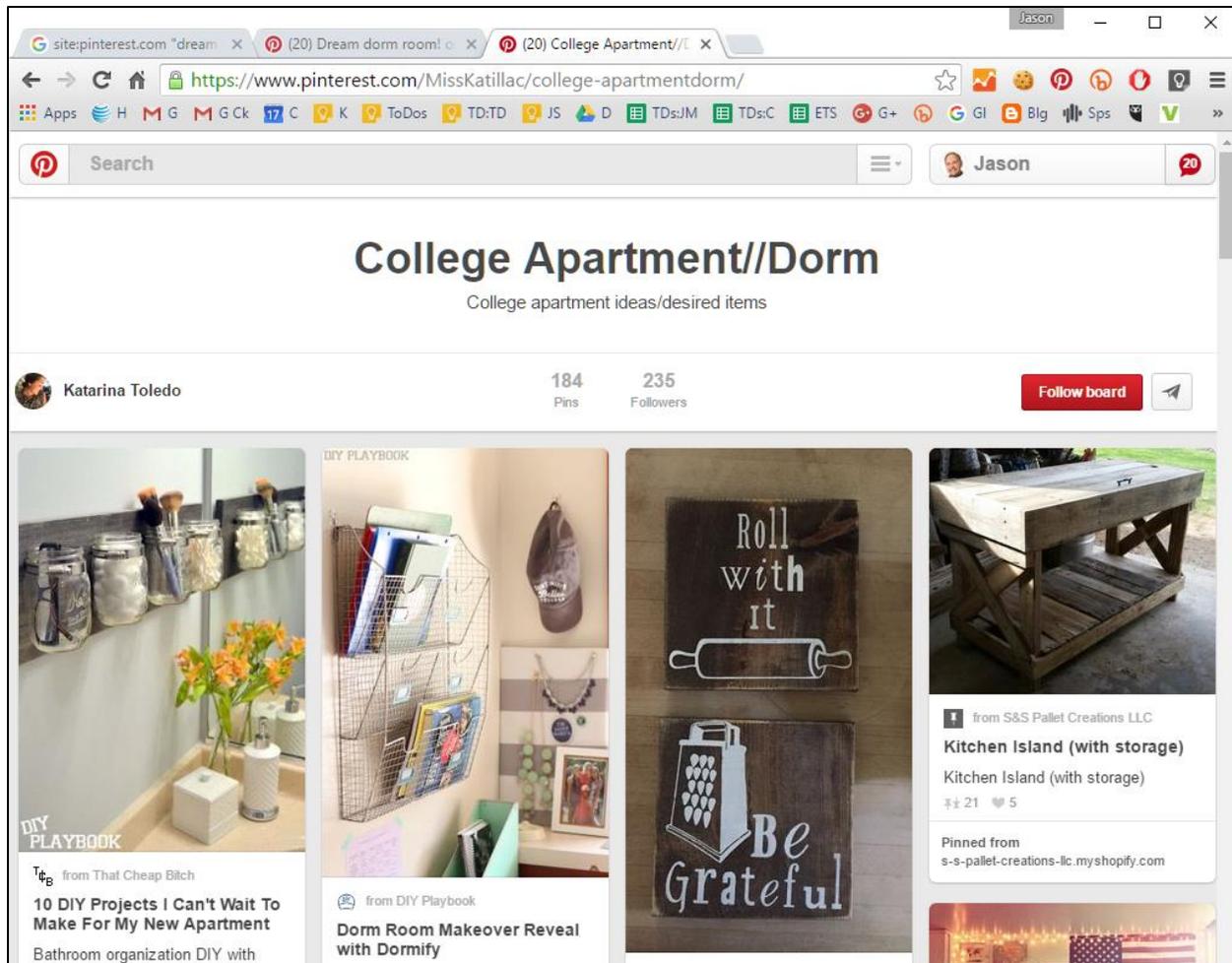
**Pins:** I can “pin” things I find on the Web such as blog posts, videos, images, or products to buy to my “boards” as a collection of ideas, things to buy. I can also upload items directly.

**Search.** I can browse Pinterest, search Pinterest, or search the Web for interesting things to “pin” to my boards.

**Collaboration:** I can invite others to comment on my board or pins, and to pin items to my boards directly. I can also pin things to their boards.

**Social:** I have a news feed, wherein Pinterest shows me the pins of people, brands, and boards I follow as well as suggestions based on my (revealed) interests. People can also follow me and my boards, and like, comment, and reshare items that I am pinning. Through collaborative boards, we can pin and share ideas together.

To get the hang of Pinterest, create your personal profile, create some boards, download the “Pin it” button, and start playing with the site. Using Pinterest is the best way to begin to understand how to market on Pinterest. For example, to view a Pinterest search for “dream college dorm rooms,” visit <http://jmlinks.com/2o>. To visit some sample idea boards, visit <http://jmlinks.com/2p> or <http://jmlinks.com/13f>. Here’s a screenshot:



Notice how people use Pinterest as a **visual bookmarking system** of ideas (largely, but not exclusively, of stuff to buy or make), and how others can comment on, and even contribute to these boards in a collaborative fashion.

Accordingly, there are two basic marketing opportunities on Pinterest:

**Direct.** Get your items “pinned” to the boards of others, or have them show up in relevant Pinterest searches. This is a direct buy path: customers “discover” your pins and then buy them.

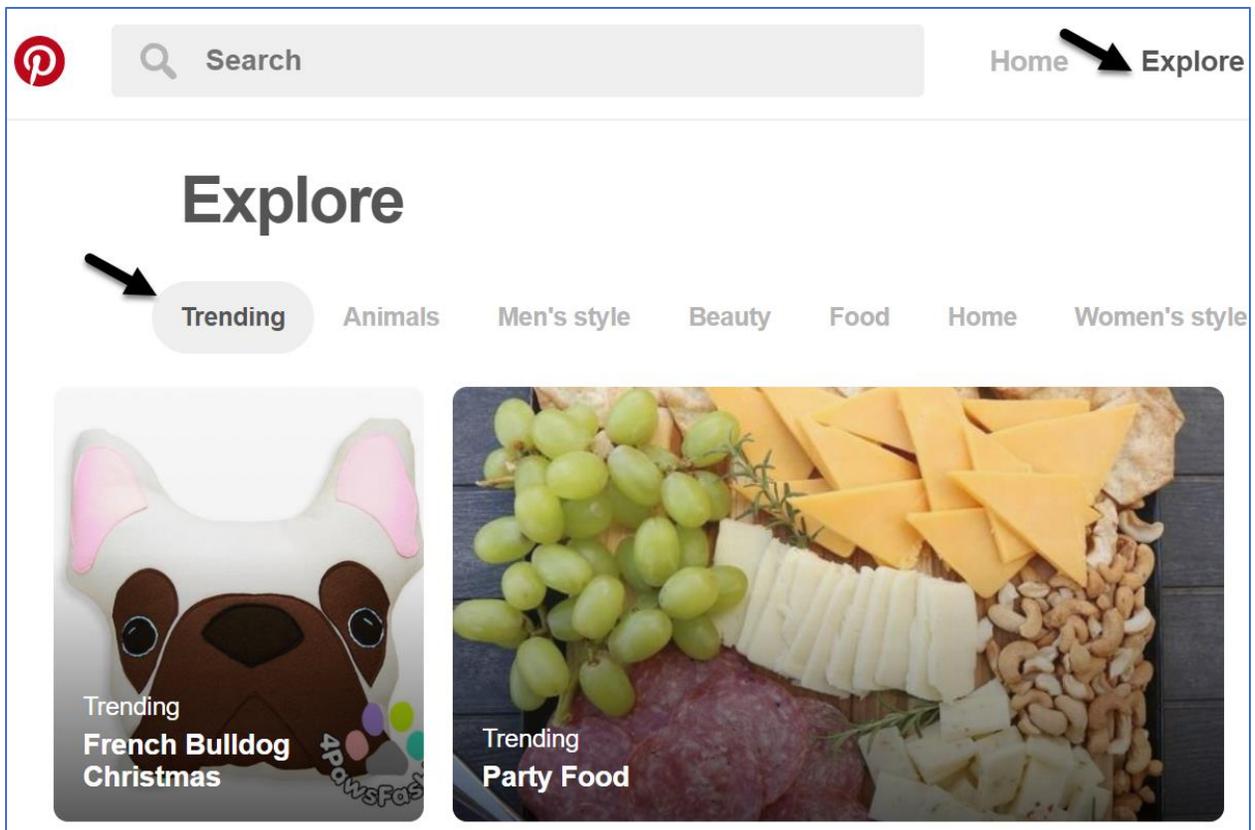
**Indirect.** Create “idea boards” of your own that are relevant to your product or service. This is more indirect, in the sense that customers find your boards interesting or helpful, and then “follow” your boards, thus learning about your products or services that have been “pinned” to your boards as well as the boards as well.

Once you understand the idea of visual bookmarking or “idea boards,” then you’ve “got” Pinterest. One you grasp the idea of being a “helpful vendor” with “helpful boards” that identify fun, lively things to do, buy, or make, and you grasp the idea of encouraging your customers to “pin” your products to their boards, you’ve “got” the idea of marketing via Pinterest.

As on other social media, people can “follow” other people or brands (or just their boards) and when that person, brand, or board has a new pin, that new pin shows in their news feed. In addition, notifications are generated when someone likes, comments, or repins one of your pin (or boards, or account).

### **Search or Browse Pinterest**

People can search Pinterest directly, or by clicking on the categories button, one can browse Pinterest by categories. To do that, simply click on “Explore” button at the top right of the search screen, and then scroll down the left side at “trending” and “categories.” Here’s a screenshot:



The “home feed” (when you click on home or just log in either on the desktop or on your phone), of course, is your primary news feed on Pinterest: pins selected for you by the Pinterest algorithm based on your previous interests and engagements. “Explore,” in contrast, gets you drill downs by category. “Trending,” of course, is what’s currently “trending.” “Animals” are trending pins on animals; “Men’s style” is trending pins for men’s fashion, etc. “Explore,” in summary, is a way for you (or any user) to browse Pinterest by category, much as you might browse Amazon or Yelp by category.

You can see that in my case, Pinterest has figured out that I am a man and have a (mild) interest in fashion. Hence, it shows me “Men’s Fashion” when I click on “Explore.” While most of Pinterest is retail-oriented and most of that female-oriented, if you sell to men, do not, therefore, despair. There are men to be found on Pinterest and topics of interest to men. For example, check out Men’s fashion at <http://jmlinks.com/2q> or pet accessories at <http://jmlinks.com/2r>. Classic cars, sporting goods, and other shopping and/or do-it-yourself activities are popular with the male demographic and can be found on Pinterest. Anything connecting to do-it-yourself or recipes / cooking / home decor is also a good bet as a marketing opportunity.

Pinterest has an excellent guide on how to use the platform at <http://jmlinks.com/2s>, an in-depth help center at <http://jmlinks.com/2t>, and a *Pinterest for business center* at <http://jmlinks.com/2u>. Between using these official guides, and systematically researching what's happening on Pinterest, you'll easily see marketing opportunities for your product, service, or company. (*Or, you'll quickly realize that Pinterest is not for you, and you can move on to a more promising social media.*)

## » INVENTORY COMPANIES ON PINTEREST

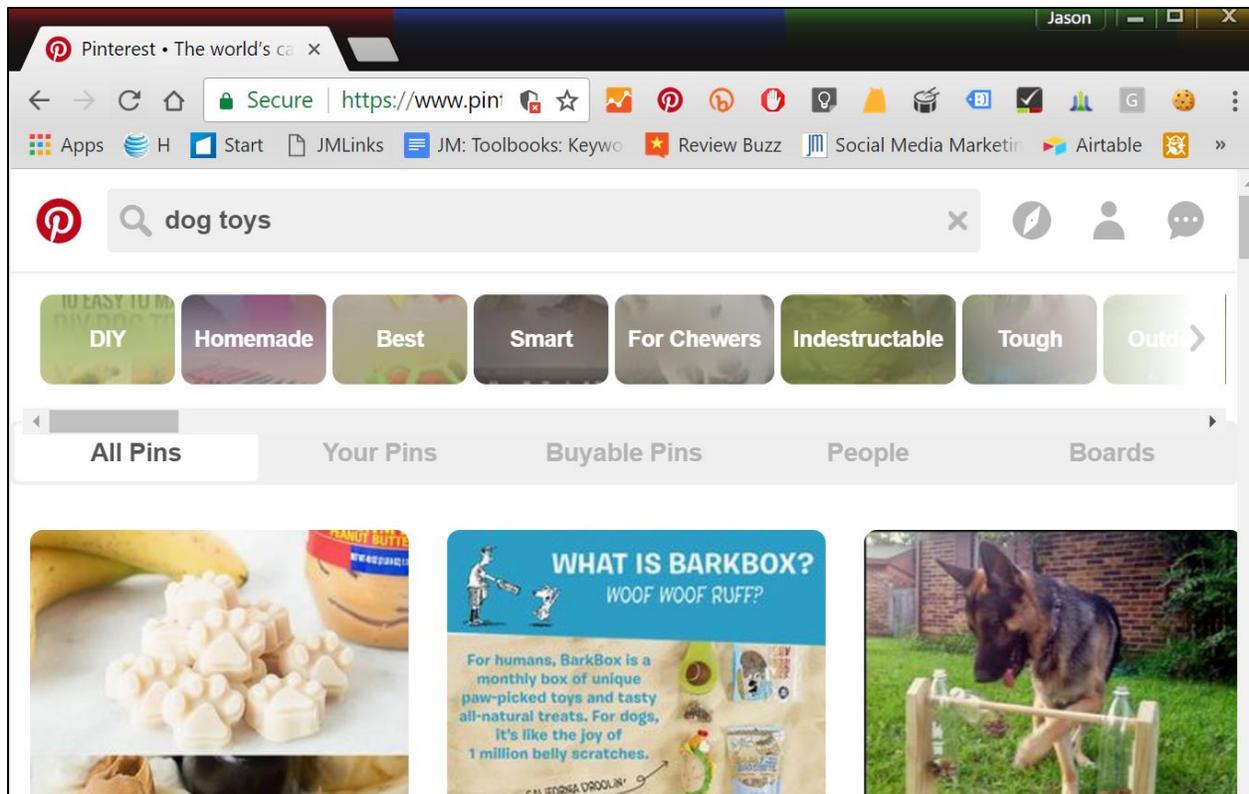
The best way to research whether Pinterest has any value to your marketing is to **research** other companies on Pinterest and observe how their fans interact with them on the platform. First, you need to understand how to find companies on Pinterest. Second, you should make a list of companies (and boards) to follow on Pinterest (and follow them with your personal profile). Note: it's important to realize that you can and should follow BOTH companies AND boards, as one company (e.g., Whole Foods) can have multiple boards (best soups, ideas for grilling, salad concepts, etc.). Third, you need to know how to determine what customers are doing on Pinterest, and fourth, you must assess whether any of this has potential value for our company's marketing strategy.

**VIDEO.** Watch a video tutorial on Pinterest marketing basics at <http://jmlinks.com/17c>.

## Ways to Search Pinterest

First identify the keyword themes that matter to you and your potential customers. For example, if you are a maker of dog toys, then your targets are people who have dogs and are using Pinterest as a way to brainstorm toys for dogs and interact with other Pinterest users about the pros and cons of specific dog toys. In some cases, these will be items to buy, in other cases items to make, and in still others blog posts, infographics, pictures or videos that relate to the theme of "dog toys."

Type the words "dog toys": into the search box while you are logged into Pinterest. Here's a screenshot:



Pinterest, like any search engine, displays results below that have the words “dog toys” in them. If you click on a pin, then you can go down to view that pin and also see the board and/or account associated with that pin. For example, here’s a pin that came up when I searched for “dog toys” at <http://jmlinks.com/2v>.

Send ... Save



T Saved from [thepetleague.com](http://thepetleague.com) Visit

If you click on the Pin, you go their website at <http://jmlinks.com/2w>, where (guess what) you can not only **read** about the product, but you can also **buy** the *LaRoo Dog Flying Ring Dog Frisbee Dog Toys Pets Flying Disc Non-Toxic Dog Chew Toys Fitness Ring for Dogs!* Yes, that's a mouthful, but a) isn't the Beagle post-capture of the flying disc, cute, b) don't you want to buy it, and c) when it comes to your dog, of course, money is no issue!

Back to the pin on Pinterest, if you scroll down you can see a clickable link to the Board / Account to which this has been pinned. Here's a screenshot:

The screenshot shows a web browser window displaying a Pinterest board. The browser's address bar shows the URL <https://www.pinterest.com/thePETleague/dog-toys/>. The Pinterest interface includes a search bar and a 'Home' button. The board is titled 'Dog Toys' and has 83 pins and 157 followers. Two pins are visible:

- Pin 1:** A colorful caterpillar toy. The caption reads: "Includes 9 squeakers, 1 in each compartment Rattle and..."
- Pin 2:** A ZISC dog frisbee. The caption reads: "High-flying-fun frisbee that is perfect for fetch and..."

You can go to the board at <http://jmlinks.com/37a>. Remember that users can like, comment on, or repin pins by clicking into them and then selecting the appropriate button.

Of course, you're probably not in the dog toy industry. You are more interested in how competitors and other companies use Pinterest as a marketing vehicle in *your* industry. To find companies in your industry, look at the pins returned for your search and at the bottom look for URL's that sound corporate or pins that indicate "promoted pins."

For instance, if you ARE in the dog toy industry, you might end up at any of these companies' Pinterest pages:

**Waggo Pet** (<https://www.pinterest.com/WaggoPet/>) - Lifestyle brand and purveyor of design-driven, happy-centric goodies for home and pet. You'll see that they have a board called "ETC" focused on dogs at <https://www.pinterest.com/WaggoPet/etc/>.

**Ruff Guides** (<https://www.pinterest.com/source/ruffguides.com/>) – a purveyor of dog-friendly guides to the United States.

**Collar Planet Online** (<https://www.pinterest.com/collarplanet/>) - specializes in unique Martingale Collars, Pet Jewelry, Jeweled and Leather Dog Collars and Leashes. Large assortment of dog costumes, dog clothes and more!

**Swanky Pet** (<https://www.pinterest.com/swankypet/>) - Stylish dog collars and more! All items are made-to-order --- let them know what to make for you!

A quick way to find companies after a search is to hit CTRL+F on your keyboard (COMMAND F on Mac) and type in "promoted." That will highlight the promoted (company) pins. These are pins that are being advertised, and consequently will originate from companies as opposed to individuals. As you research companies via your keywords, look for companies with many followers and whose boards / pins show a great deal of interaction: many pins, likes, repins, and comments. Pinterest, after all, is a *social* medium, and your goal is to identify companies that "get" Pinterest well enough to build large, engaged follower communities.

You can also browse Pinterest by category at <https://www.pinterest.com/categories/>. Again, within relevant categories, try to identify companies as opposed to individuals so you can "reverse engineer" their marketing efforts.

## Use Google to Search Pinterest

A second way to search Pinterest to find companies of interest is to use Google. Simply go to Google and type in *site:pinterest.com* plus your keywords, as for example: *site:pinterest.com dog toys* at <http://jmlinks.com/2z>. Remember there is *no space* between the colon and *pinterest.com*! Note that at the top of the search results, Google will usually find the Pinterest category page, in this case at <https://www.pinterest.com/explore/dog-toys/>. There, you can drill down to pins, boards, and pages of interest.

A third way is to simply go to competitor websites, or websites of companies you like, and look for the Pinterest icon. Then just click over to Pinterest and follow their company or specific boards of that company. For example, from <http://www.rei.com/>, you'll see the link to their Pinterest page at <https://www.pinterest.com/reicoop/>.

Not surprisingly, since Pinterest is so successful in consumer retail, many of your large retailers have the most sophisticated marketing efforts on Pinterest. Identify a few consumer retailers you like, follow them on Pinterest, and “reverse engineer” their marketing strategies. Here are some of my favorites:

**Target** at <https://www.pinterest.com/target/>.

**Martha Stewart Living** at <https://www.pinterest.com/marthastewart/>

**Chobani** at <https://www.pinterest.com/chobani/>.

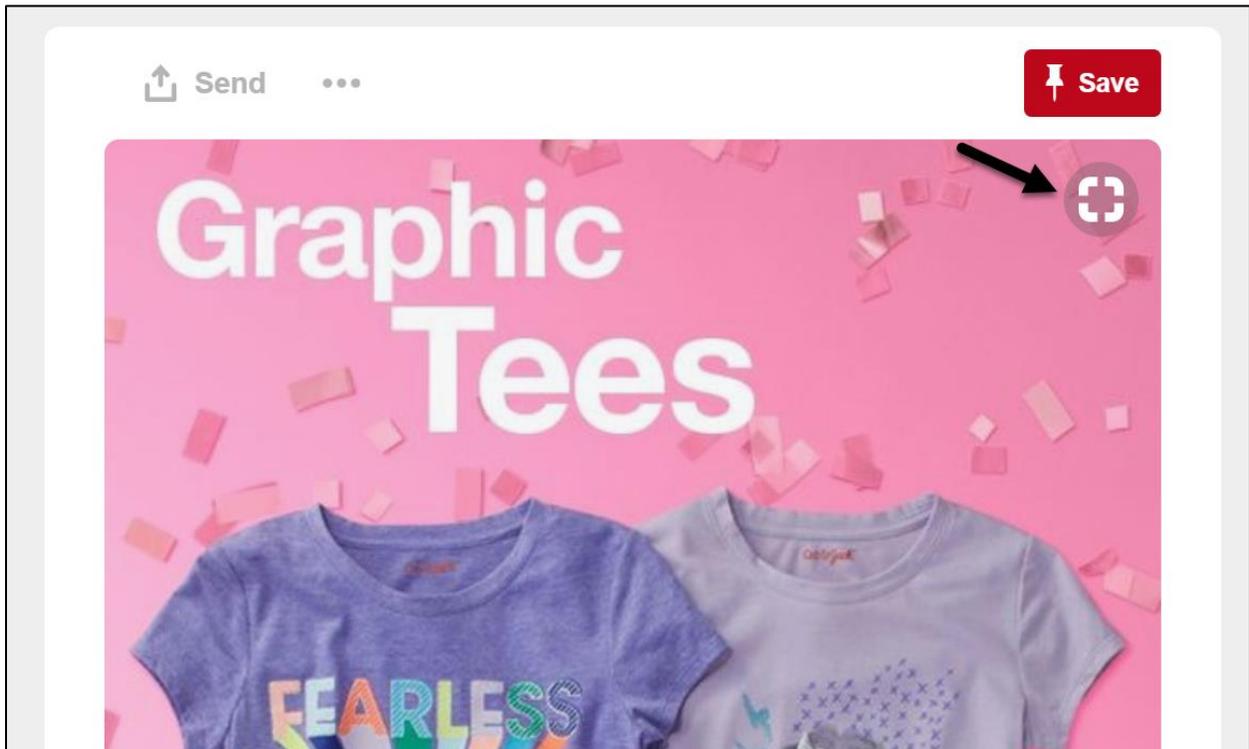
**Birchbox** at <https://www.pinterest.com/birchbox/>.

**Everyday Health** at <https://www.pinterest.com/everydayhealth/>.

**Free People** at <https://www.pinterest.com/freepeople/>.

**Intel** at <https://www.pinterest.com/intel/>.

While we're looking at retailers, here's a neat trick to explore Pinterest by pin. First, do a search for your keyword (e.g., “T-shirts”). Next, find a pin that sparks your interest – especially one that is a product photo. Click on the pin. Finally, in the top right-hand corner click on the *rounded square icon*, and Pinterest will do a “visual” search for similar products. Here's a screenshot:



By clicking on the top right square, you can find **visually similar results** (e.g., pins), plus you'll get a list of keywords across the top that can also help you explore keyword themes on Pinterest. Here's a screenshot:



In this way, you can browse competitor pins or just relevant pins and discover related keyword themes for your own pinning!

### **Another Pinterest Trick**

It's a little geeky, but you can create a very special type of URL, type this into your browser, and see what pins are being pinned for any given website. For example,

**<https://www.pinterest.com/source/nytimes.com/> = pins from the New York Times**

**[https://www.pinterest.com/source/rei.com](https://www.pinterest.com/source/rei.com/) = pins from REI.com**

You can do this for your own website, as in

**<https://www.pinterest.com/source/jm-seo.org/> = pins from JM-seo.org.**

Simply replace *jm-seo.org* in the string above with your own domain, and then copy/paste the complete URL into the address bar of your browser. Do this for your company on a regular basis (bookmark the URL), and you can see what customers and potential customers are pinning from your website; within Pinterest analytics, you can verify ownership of your website and get even more details on your own site.

This is important because you want to see what types of pins are getting customer interaction on Pinterest. Another method to see what's being shared on Pinterest about a specific domain is to use a tool like Buzzsumo (**<http://www.buzzsumo.com/>**). Simply type in the domain of interest into Buzzsumo, sort the Pinterest column on the right, and you can see the most popular content on Pinterest for a particular domain.

# IDENTIFY COMPANIES WHO DO PINTEREST MARKETING WELL, AND REVERSE ENGINEER THEM

Don't be afraid to "follow" companies via Pinterest (even your competitors). In fact, I strongly encourage it: by "following" companies you actually "like," you'll experience them marketing to you, and you can then reverse engineer this for your own company.

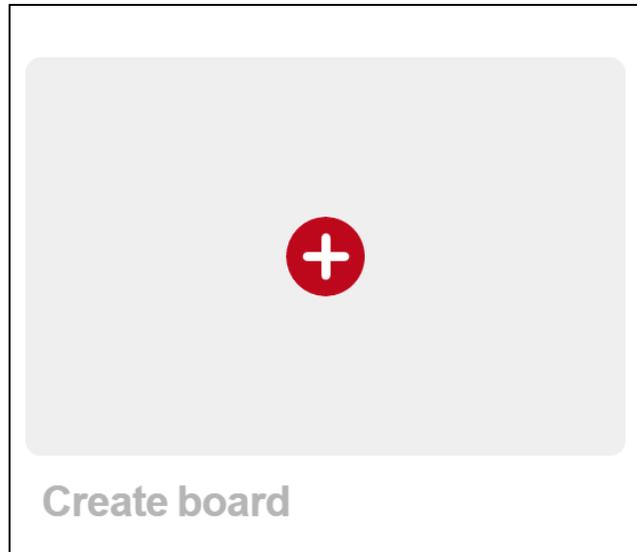
For your first **TODO**, download the **Pinterest Research Worksheet**. For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code '2018social' to register if you have not already done so), and click on the link to the "Pinterest Research Worksheet." You'll answer questions as to whether your potential customers are on Pinterest, identify brands to follow, and inventory what you like and dislike about their Pinterest set up and marketing strategy.

## » SET UP AND OPTIMIZE YOUR PINTEREST PAGE

Now that you've got the basics of Pinterest down, it's time to set up or optimize your Pinterest page. Remember, people have "profiles" and businesses have "accounts" on Pinterest, often also called "Pages." You'll generally want a business account, or Page, on Pinterest. To set one up for the first time, go to *Pinterest for Business* at <https://business.pinterest.com/>. You can also convert a "profile" to a business "account" if you mistakenly joined as an individual at <https://business.pinterest.com/> and click on the "Join now" text and then "Switch to a business" or go to <http://jmlinks.com/32h>.

Once you've joined, you have only a very basic set up – your profile picture, username (URL), "about you," location, and website. That's it. Once you've filled out this information, you're set up on Pinterest as a business.

Next, set up some boards by clicking on the "Create a Board" on the left of the screen. Here's a screenshot:



When you create a board, give it a name, a description, a category, a map or location (useful if you are a local business). If you're just building out the board, you can also temporarily make it *secret* and then change it to *public* at a later date.

If you want to make a board collaborative, you identify “collaborators” by typing in their names or email addresses. Pinterest will then invite them to start pinning items to your board. The easiest way to start pinning items to your board is to download the “Pinterest button” onto your browser at <http://jmlinks.com/2m>. You can also manually copy URL's over to pin an item. With the concept that a board is an “idea board,” start identifying and pinning items from the Web such as blog posts, images or photos, and yes, even products from your eCommerce store to your new board.

## Board Strategy

Social media is a *party*, not a *prison*, and so it goes with your Pinterest boards. Your boards should attract people to follow them by providing something useful, something visual, something fun. Ask these questions. What is the board “about”? Who will want to “follow” it, Pin stuff from it (or to it), comment, share, and click from the board to your products. Take a board like “Gifts for Dog Lovers” at <http://jmlinks.com/3a> vs. the board “Dog Gifs” at <http://jmlinks.com/3b>. The purpose of the former is to identify fun dog gifts to BUY, while the purpose of the latter is to share funny pictures of dogs and build the brand image of *BarkPost* (<http://barkpost.com/>), a New York-based blog on dogs that also sells dog-related products. Both are legitimate social media marketing users of Pinterest – the former is just a more direct plea to “buy our stuff,” whereas the latter is more a “look at this cool stuff” (and by the way check out all the cool stuff we sell).

*Hard sell or soft sell: both work on Pinterest.*

In sum, it is incredibly important to brainstorm your boards! The questions are:

- **What is this board about?** What ideas does it collect, how does it function as a useful “idea-generator” on a particular topic?
- **Who will be interested in this board?** What value are you providing as the board-creator and board-curator by having this board? A board on dog toy ideas “saves time” for people who a) love dogs and want toys and/or b) need to buy a gift for a person who loves dogs and wants toys. Your value is curating “in” the cool stuff, and curating “out” the dumb stuff. A board that collects funny pictures of dogs is meant to give viewers a quick and easy way to get a few laughs during their busy day, and a board that collects do-it-yourself ideas for cheap dog toys helps dog lovers save money, and have fun, by building their own dog toys. Who will be interested is a function of what the board is about.
- **What will you pin to this board, and where does that content live?** Is it stuff from your eCommerce store? Stuff on Amazon? Blog posts, or how to articles? Items from your own blog? YouTube video? Content is king, on Pinterest, as on all social media.

For your second **TODO**, download the **Pinterest Setup Worksheet**. For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code ‘**2018social**’ to register if you have not already done so), and click on the link to the “Pinterest Setup Worksheet.” You’ll answer and outline the basic setup issues for your Pinterest business account (page) and boards.

## » BRAINSTORM AND EXECUTE A PINNING STRATEGY

Content is king, and queen, and jack. Now that you’ve set up your Pinterest Page, you need to think about posting (or rather pinning). Turn back to your Content Marketing plan, and remember you’ll need both other people’s content and your own content to pin:

- **Photographs and Images.** Pinterest is very visual, and you’ll need to systematically identify photographs and images that fit with your brand message and ideally encourage likes, comments, and repins (shares).

- **Blog Post and Content Summaries.** To the extent that you have an active blog and are posting items that fit with the common uses of Pinterest, pin your blog posts to Pinterest.
  - Note that the first or “featured” image will become the shareable image. Choose striking, fun images for your pins, even if what you are pinning is just a blog post!
- **Quotes.** People love quotes, and taking memorable quotes and pasting them on graphics is a win/win.
- **Infographics and Instructographics.** Factoids, how to articles, especially ones that are fun, do-it-yourself articles, lists or collections of tips or products, are excellent for Pinterest. Anything that helps a person organize ideas about products or services to buy or make will work well on Pinterest.
- **Items to Buy.** Yes! You can (and should) pin items to buy on your Pinterest boards. Unlike most other social media users, Pinterest users are “in” the shopping mode in many ways, so tastefully pinning cool items that can be bought is not just expected but encouraged.

Indeed, Pinterest realizes that buying is a logical way to monetize the site, and so they have announced “Buy it on Pinterest” at <http://jmlinks.com/32j>. You can also read about *buyable pins* at <http://jmlinks.com/3d>. Another option here is so-called *rich pins*, which are dynamically updated pins from your eCommerce store. Learn about them at <http://jmlinks.com/3e>.

Clearly, Pinterest will help you shamelessly promote, link to, and sell your stuff via Pinterest! In this sense, it is unique among social media in being so unabashedly pro-e-commerce.

## » PROMOTE YOUR PINTEREST PAGE, BOARD, AND PINS

Once you’ve set up your Pinterest business account, and begun to populate it with boards and pins on a regular basis, you’ve essentially “set up” the party. Now it’s time to send out the invitations. In and of itself, neither a Pinterest Page nor a Pinterest board will be self-promoting!

# MAKE YOUR BOARDS USEFUL, FUN, AND MESMERIZING FOR YOUR USERS

Remember: social media is a **party**. You must have yummy yummy food and entertainment for people to show up, and stick around. Thus, as you promote your Pinterest Page, always keep front and center “what’s in it for them” – what will they get by “following” your Pinterest page and/or Pinterest boards, and checking them out on a regular basis?

Assuming your Page and/or boards have lots of useful, provocative content, here are some common ways to promote your Pinterest account and boards:

- **Real World to Social.** Don’t forget the real world! If you are a museum store, for example, be sure that the cashiers recommend to people that they “follow” your Pinterest Page and/or boards? *Why? Because they’ll get insider tips, fun do-it-yourself posts, announcements on upcoming museum and museum store events, selected items from your online museum store, etc. Oh, and we’ll share collections of do-it-yourself tips as well as gift ideas for that hard-to-buy-for someone in your life.*
- **Cross-Promotion.** Link your website to your Pinterest Page, your blog posts to your Pinterest Page, your Twitter to your Pinterest Page, etc. Notice how big brands like REI do this: one digital property promotes another digital property.
- **Email.** Email your customer list and ask them to “follow” your Page or boards. Be specific: you can drill down to specific **subgroups** and match their interests with **specific boards**. Again, you must have a reason why they’ll follow it: what’s in it for them? Have a contest, give away something for free, or otherwise motivate them to click from the email to your Page, and then “follow” your page or board.
- **Pinterest Internal.** Interact with other Pages, Pins, and Boards, repin their content, comment on timely topics using #hashtags, and reach out to complementary Pages to work with you on co-promotion.
- **Pinterest SEO / Search.** People use Pinterest to generate ideas, especially before shopping for something big like a wedding or a dorm room, and therefore search is very big on Pinterest. Research your keywords and name your boards and pins after those keywords, and include keywords in your description. As you get likes, pins, and repins, the Pinterest algorithm will reward your pins with higher placement in Pinterest search results.

- **Use Pinterest Plugins.** Pinterest has numerous plugins that allow you to “embed” your Pinterest items on your website, and allow users to easily “pin” your eCommerce or blog posts to their own boards. Get it at <http://jmlinks.com/13g>. In this way, your blog can promote your Pinterest Page, your eCommerce site can promote your Pinterest Page, and your Pinterest Page can promote your eCommerce store and/or blog. Similarly, your YouTube videos can promote your Pinterest Page, and your Pinterest Page can promote your YouTube Videos. And the same goes, of course, for your Pinterest boards.
- **Leverage your Fans.** People who like your Page are your best promoters. Remember, it’s *social* (!) media, and encouraging your customers to share your content is the name of the game. You want to leverage your fans as much as possible to share your content. Asking key influencers to participate in a board is a great way to both build content and encourage publicity.

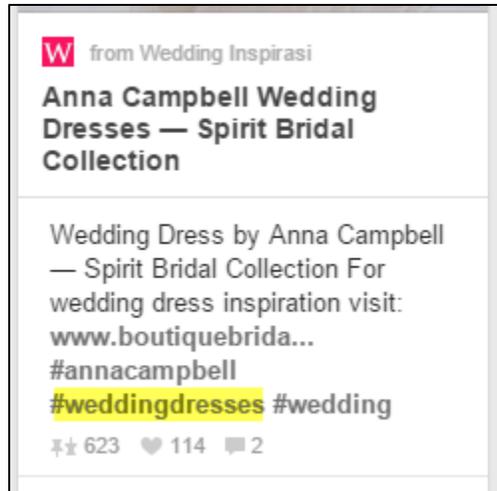
## ENCOURAGE YOUR FANS TO CONTRIBUTE TO YOUR BOARDS, AND SHARE YOUR CONTENT

Here are some specific items worth mentioning:

**Group boards.** Group boards allow you to collaborate with your employees and customers on Pinterest. Check them out at <http://jmlinks.com/3c>. Brainstorm a collaborative project between you and your customers, and use Pinterest as a means to cooperate online.

**Rich Pins and “Buyable” Pins.** These two mechanisms link your eCommerce store to/from Pinterest. They are not promotion mechanisms per se, but they make the buying process as easy as possible. Check out the links at <http://jmlinks.com/3d> and <http://jmlinks.com/3e> to learn more about these cross-linking strategies.

**Hashtags.** Like Twitter and Instagram, Pinterest has hashtags which are ways that people can communicate on a theme. Anything marked with a #hashtag is clickable in a pin. Here’s a screenshot of a pin with the hashtag #weddingdresses highlighted:



And here's what happens if you click on that link: <http://jmlinks.com/13h>. It generates a search on Pinterest for *wedding dress*. So the long and short of it is that by including hashtags in your pins, you become more findable in Pinterest search whether directly or by the search engine function. Identify relevant hashtags and include them in your best pins.

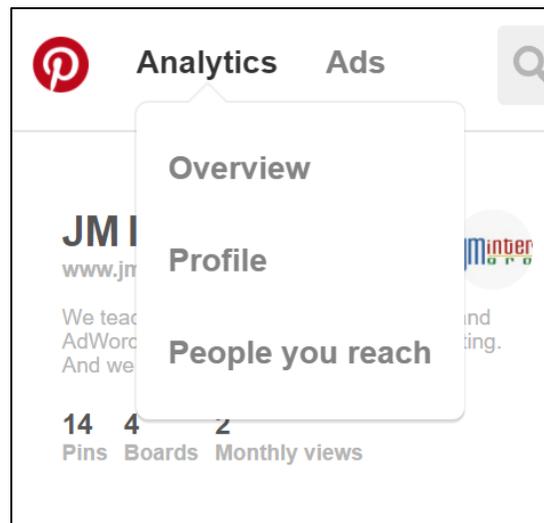
**Search.** Throughout, remember that search is very important on Pinterest. Make sure that you know your keywords, and that you weave these keywords into the titles and descriptions of your pins and boards. People use Pinterest as a “search engine” to find interesting products and ideas, similar to how people use Yelp to identify fun restaurants and great plumbers.

*Search, and therefore search optimization, should be a major part of your Pinterest promotion strategy.*

**Advertise.** Advertising is increasingly important to success on Pinterest. I've mentioned *rich pins* and *buyable pins*, which are integrations between your online store and Pinterest. “Promoted pins” function much the same way as “promoted posts” on Facebook: you identify a pin to promote, and by advertising, Pinterest pushes these pins to the top of the news feed and search functions on the site. Learn more at <https://ads.pinterest.com/>.

## » MEASURE YOUR RESULTS

Once you set up a business account and boards on Pinterest, Pinterest gives you decent metrics on how popular they are. To find them, click on the “analytics” link on the left of the Pinterest web page when you’re logged in as a business account. Here’s a screenshot:



That will transport you to <https://analytics.pinterest.com/>. You can also confirm your website and Pinterest will show you what people are pinning from your website or blog. (Note: analytics are only available for corporate accounts, not personal profiles).

## Google Analytics

For many of us, we want to drive traffic from Pinterest to our website, even to our ecommerce store or to download a free eBook or software package to get a sales lead. Sign up for Google Analytics (<https://www.google.com/analytics>) and install the required tracking code. Inside of your Google Analytics account on the left column, drill down by clicking on Acquisition > Social > Overview. Then on the right hand side of the screen you’ll see a list of Social Networks. Find Pinterest on that list, and click on that. Google Analytics will tell you what URLs people clicked to from Pinterest to your Website, giving you insights into what types of web content people find attractive.

You can also create a custom Segment to look at only Pinterest traffic and its behavior. For information on how to create custom Segments in Google Analytics, go to

<http://jmlinks.com/1f>. For the Google help files on Segments go to <http://jmlinks.com/1g>.

In sum, inside of Pinterest you can see how people interact with your Page and posts. Inside of Google Analytics, you can see where they land on your website and what they do after they arrive. This includes eCommerce, as Google Analytics is very well integrated with eCommerce. You can learn not only if Pinterest is sending traffic to your website but also whether that traffic is converting to inquiries, downloads, and eCommerce sales.

## »» CHECKLIST: PINTEREST ACTION ITEMS

Test your knowledge of Pinterest! Take the *Pinterest marketing quiz* at <http://jmlinks.com/qzpi>. Next, here are your Pinterest **Action Items**:

- Research** whether your customers (and competitors) are on Pinterest. What are they doing? Why? Be sure to distinguish among individual accounts, business accounts, pins, boards, and hashtags. Be sure to understand how to both search and browse Pinterest.
- Set up a business account** on Pinterest as well as one or two boards that represent customer interests.
- Brainstorm a content strategy** for Pinterest at both the board and pin level. Be systematic and diligent about pinning. Be interactive, including asking your superfans to participate in your boards.
  - If appropriate, enable **rich pins** and/or **buyable pins** for your eCommerce store.
- Promote your pins** both on Pinterest by strategies like #hashtags and SEO, and off of Pinterest by real world to Pinterest promotion, cross promotion, etc. Consider **advertising** if Pinterest is a strong “yes” for you and you have the budget.
- Measure** your results on Pinterest at the pin, board, and account level (are you getting interactivity from real customers?) and whether activity is translating into better brand awareness and even eCommerce sales.

Check out the **free tools**! Go to my *Social Media Marketing Dashboard > Pinterest* for my favorite free tools on Pinterest. Just visit <http://jmlinks.com/smmdash>.

## »» **DELIVERABLE: A PINTEREST MARKETING PLAN**

Now that we've come to the end of our chapter on Pinterest, your **DELIVERABLE** has arrived. For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code '2018social' to register if you have not already done so), and click on the link to the "Pinterest Marketing Plan." By filling out this plan, you and your team will establish a vision of what you want to achieve via Pinterest.

# SURVEY OFFER

## CLAIM YOUR \$5 REBATE! HERE'S HOW -

- Visit <http://jmlinks.com/survey>.
- Take a short, simple survey about the book.
- Indicate whether you want a \$5 rebate or want to make a contribution to our scholarship fund.



## WE WILL THEN -

- Rebate you the \$5, or thank you profusely for helping a deserving young marketer.

**~ \$5 REBATE OFFER ~**

**~ LIMITED TO ONE PER CUSTOMER ~**

**EXPIRES: 3/1/2018**

**SUBJECT TO CHANGE WITHOUT NOTICE**

**GOT QUESTIONS? CALL 800-298-4065**



# 9

## YELP, GOOGLE, AND REVIEWS

Let's suppose you have a restaurant, or you're a local plumber, dentist, CPA, or divorce attorney or any of the thousands of local businesses that service customers in their day-to-day life. Before the advent of social media sites like Yelp, Google, YP.com, AirBnB, TripAdvisor and their kind, consumers might have gone to the physical yellow pages or perhaps visited your website after a Google search. You were in charge of your marketing message: *customers couldn't really "talk back."*

The "Review Revolution" led by Yelp and since followed by Google, YP.com, AirBnB, TripAdvisor, Angie's list, Amazon, Facebook, and other sites has dramatically changed the local landscape. These "review sites" have made it possible for customers to "talk back," sharing their positive and negative reviews about local business as well as businesses of all types across social media.

*Reviews, in short, allow consumers to talk back: the good, the bad, and the ugly. And the just plain crazy.*

A happy customer can leave a **positive** review about your business, and a not-so-happy customer can leave a scathing **negative** review. Moreover, it's a fact that many (if not most) potential customers go online and check reviews before engaging with a local business. If they see five star or four star reviews on Google or Yelp, they may reach out to your business with a phone call or email inquiry, or visit your restaurant, bar, or coffee shop. If they see two star or many negative reviews (perhaps even just one) on Yelp, Google, or another local review site, they may skip over you and go to competitors who have better online reviews.

*Online reviews, in short can make, or break, your business.*

Using Yelp and Google as models, this chapter explores the “Review Revolution.” First, we’ll explore why and how customer reviews have dramatically changed the local business landscape. Second, we’ll explore how to claim and optimize your listings on Yelp, Google, and other review sites. Third, we’ll investigate how reviews work and how you can nurture positive reviews about your business without getting into trouble. Finally, we’ll finish up with a discussion of online reputation management. We’ll focus mainly on *local businesses*, but remember that if any type of review site matters for your business (e.g., Amazon, GlassDoor, AirBnB, Facebook reviews), much of the same logic will apply.

## **Let’s get started!**

### **TODO LIST:**

- » Explore How Review Sites Work
- » Inventory Companies on Yelp, Google or Other Relevant Sites
- » Claim and Optimize Your Listings
- » SEO Your Local Website
- » Cultivate Positive Reviews
- » Monitor and Improve Your Online Reputation
- » Measure your Results
- »» Checklist: Review Action Items
- »» Deliverable: A Yelp / Local Marketing Plan

### **» EXPLORE HOW REVIEW SITES WORK**

The first big thing to grasp as a local business is the **Review Revolution** brought to us by Yelp in 2004. Imagine it’s 1994, ten years prior to Yelp’s founding, and you have a local Italian restaurant in Los Angeles, California. One day you are lucky enough to be visited by the review critic for the *Los Angeles Times*. You recognize her from her picture in the

*LA Times*, and you realize that she can make – or break – your new Italian eatery. You do your best to not let her know you recognize who she is, and you do your utmost to ensure that she has a positive experience at your restaurant. One week later your hopes and prayers are answered: a positive restaurant review in the local newspaper. Business booms.

Alternatively, if she had written a critical review of your restaurant, business would not have *boomed*. It would have *busted*. **The review critic, in short, had an immense amount of power over local restaurants.** However, if a) you were a small restaurant you had minimal chance of ever getting reviewed, and b) if you were a divorce attorney, plumber, massage therapist, CPA or many other types of local businesses, there were essentially no reviewers available. Your main marketing channel was not reviews but customer word of mouth.

Enter the **Review Revolution**. In October, 2004, Yelp (<http://www.yelp.com>) was founded. Consumers of all types could now review not just local restaurants but local plumbers, dentists, massage therapists and thousands of other types of local businesses. The Review Revolution was like any other mass revolution: the masses burst open the doors of the castle, executed the ruling class, and turned over the table and chairs. *It was a bit bloody. It was a bit noisy. And it was a bit unpleasant.* If, for example, you were the *Los Angeles Times* restaurant critic, your absolute power over restaurants was broken. Professional critics, from restaurant reviewers to product reviewers to book reviewers, look on the review revolution with disgust.

The Review Revolution brought democracy to local reviews. Now anyone could review anything. No control: democracy arrived to reviews.

But here's the rub. Like the French Revolution, the Review Revolution brought the masses into the ecosystem. It has not been very organized or coherent; online reviews run the gamut from informative to ridiculous. Whereas the big reviewers of the *Los Angeles Times*, *San Francisco Chronicle*, and *New York Times* were educated and civilized (though they could be brutal in their reviews), the new review class can be rough and tumble. Anyone – and I do mean anyone – can write a review: good, bad, or ugly. And let's not forget: *just plain crazy*. To be frank, we are still living in this unsettled Review Revolution, and like the French Revolution, there is no going back: the old system is dead.

# UNDERSTAND THE REVIEW REVOLUTION

If you're reading this chapter, you've probably already grasped that online reviews can make or break your local business performance. Many, if not all, potential customers consult online review sites like TripAdvisor, AirBnB, Yelp, or Google before engaging with local businesses. If they see *positive* reviews, they are primed for a *positive* experience. If they see *negative* reviews, they are so *negatively* primed that they may avoid any contact whatsoever with your business. Reviews now impact all types of local businesses; nearly every local business is being reviewed online 24/7 365.

Let's step back for a moment and understand the **review ecosystem**. With Yelp as the most important independent local review site, we will use Yelp as our model, and recognize that what's true for Yelp is generally true for all review sites because they all follow the same social media rules of engagement. (Most of this also applies to Google+ / Google, by far the most important non-independent review site (owned by Google, of course)).

Here's how review sites work:

1. **Local businesses have listings.** Business listings are created *without the permission or participation of the business owner*, and exist whether or not the business owner has claimed, optimized, and participated in the review ecosystem. *You as the business owner do not have the right to "delete" your listing on Yelp!* It's like a business Page on Facebook, to the extent that your business has an online "Page" on Yelp. But unlike on Facebook, you are not in control!
2. **Customers write reviews.** Registered Yelp users are able to write reviews about any local business they choose. *If your business is not listed, Yelp users can even create a listing for your business and then review it.* These reviews may be good or bad, extremely positive or so negatively scathing as to infuriate you as the business owner. The Yelpers are basically in control.
3. **Customer reviewers also establish a reputation.** The more reviews a customer writes, the older his or her profile as a reviewer on Yelp, the more friends on Yelp, the more thumbs up or thumbs down to their reviews, the stronger their profile gets. Yelp has filters to filter out "fake" or "weak" reviews from showing entirely. The stronger the customer profile, the higher their reviews rise on the pages of those businesses that they have reviewed. Your business and the Yelpers

are both simultaneously establishing a reputation, and that reputation impacts whether your information (your listing, their review) shows prominently on Yelp. (Remember: the same is true for Google, TripAdvisor, Airbnb, and even Amazon).

4. **Businesses establish a reputation.** As your business is reviewed on Yelp, the more positive reviews it has, the more customers come to visit it (especially first time customers). But the more negative reviews you have, the fewer customers you get. This is called a “virtuous circle” and a “vicious circle.”
5. **Prospective customers read reviews.** Potential customers visit sites like Yelp, CitySearch, TripAdvisor, Google, and search for businesses via keywords. They find businesses of interest and read the reviews. Generally speaking, if they find positive reviews, they are primed to engage with that business. If they find negative reviews, they may not so much as even call or visit the business.
6. **Businesses claim their local listings.** Businesses have the right to claim, and optimize, their listings. By claiming their listing on a site like Yelp, the business can “optimize” it by improving the business description with accurate keywords, uploading photos, responding to reviews, and in some cases like Google post updates. While businesses cannot delete their listings nor their negative reviews, they can participate in the new social media ecosystem of reviews.

For an overview to Yelp by Yelp, visit <http://www.yelp-support.com/>. For your first **TODO**, sign up for a Yelp account (as a consumer not a business) if you do not already have one. Next, go to Yelp (<http://www.yelp.com/>) to explore some of the following categories in your local city by typing these keywords into the Yelp search box:

*Sushi Restaurants*

*Jazz*

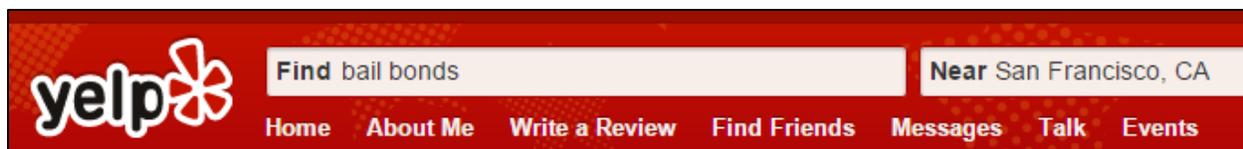
*Plumbers*

*Divorce Attorneys*

*DUI Attorneys*

*Bail Bonds*

Let’s take Bail Bonds, for example. Here’s a screenshot of how to search for “bail bonds” near San Francisco, CA:



Use the clickable links below to do the search:

- Here's a search for "Bail Bonds" near San Francisco, CA at <http://jmlinks.com/4i>.
- And here's one of the top search results: *Le Bail Bonds* at <http://jmlinks.com/32k>. (There's something so classy about being bailed out of jail by the French).

Here are some things to notice about the *Le Bail Bonds* listing.

First, scroll down about half way and look for "From the business" in red. It starts with "We have multiple offices." This is the **business listing**, as edited and submitted by the business. This indicates that this business has claimed their listing. (You'll also see a blue "Claimed" check mark next to the business name). Note the inclusion of relevant keywords, the types of search queries users might type into Yelp. Here's a screenshot:

The screenshot shows a business listing for 'Bail Bonds' on a platform like Yelp. The listing is titled 'From the business' in red text at the top left, with a close button (X) at the top right. The main content is organized into sections: 'Specialties' and 'History'. The 'Specialties' section contains several paragraphs of text describing the business's services, including multiple offices in the Bay Area, being the #1 Bail Bonds Company, and offering 24-hour service. The 'History' section states the business was established in 2007. A vertical scrollbar is visible on the right side of the listing content.

**From the business** ✕

**Specialties**

We have multiple offices located throughout the Bay Area!

The #1 **Bail** Bonds Company in the Bay Area

Has your loved one found out the hard way about the law? Let our **bail** bonds office help! Our mission is to provide professional , informative , and dedicated service. We're here to answer any questions or concerns you may have about **bail** anywhere in California .

Le **Bail** Bonds offers fast efficient service 24 hours a day, seven days a week. We specialize in short term payment plans on your **bail** fees . We have specially trained **bail** agents to help get your loved ones out of jail quickly.

We service anywhere in California!

**History**

Established in 2007.

Second, notice the **photos** at the top of the listing at <http://jmlinks.com/32m>. Click on the photos, and notice how they are “keyword heavy” including the phrase “bail bonds” and the location of “San Francisco.” These can be submitted either by the business, or by users. So, if you don’t submit some, your users might (and they might be favorable, or unfavorable, to your business).

Third, read some of the **reviews**. Notice that for any individual reviewer, Yelp indicates how many friends they have on Yelp and how many reviews they have written. For example, here is a screenshot a review of a bail bond competitor (*Bail Now Bail Bonds*), showing two friends and two reviews:

**Tonya T.**  
San Leandro, CA  
2 friends  
2 reviews

★★★★★ 12/23/2013

Would like to take a moment to send a HUGE THANK YOU to Tiki Maxwell and her team at Bail Now Bail Bonds for doing an excellent job with my brother's bond.

Tiki did a fantastic job of being very clear and precise with regards to the details of my brothers charges as well as keeping us up to date regarding the status of his case, as well as upcoming court dates. She remained professional, however was extremely compassionate and sympathetic regarding my family's situation.

Fourth, click on a **reviewer photo**, and you'll go up to their **Yelp profile**. For example, click on Tonya T (<http://jmlinks.com/41>) and you'll go up to her profile. Read her reviews and make a guess as to how "real" and how "unsolicited" her reviews are. Some reviewers will look very legitimate, and others might look solicited, paid, or even faked. You'll soon realize that Yelp, like all the review-based sites, is a hodgepodge of unsolicited and solicited reviews, real and fake reviews, and so on and so forth.

For example, here's a screen shot of a suspicious review:

**Chloe D.**  
Midtown West, Manhattan, NY  
0 friends  
1 review

★★★★☆ 9/11/2013

First to Review

My first time being arrested and I was terrified. Got in touch with my mom and a friend, and they got in touch with bail now. So beyond helpful!!! They went above and beyond letting us know step by step what's happening.

Was this review ...?

Useful 3 Funny Cool

Notice how Chloe D, has *zero* friends, has written only *one* review, lives in *Manhattan* and yet reviewed a *San Francisco* Bail Bonds. Is this a real review? A solicited review? Or a faked review?

Fifth, scroll to the very bottom and click on “review that are not currently recommended.” Yelp has a filter that attempts to filter out “fake” reviews and filter in “real reviews.” Here’s a screenshot:



Read some of these “non-recommended” reviews and attempt to guess which ones are truly real and which ones might be fake. Do you think Yelp is doing a good, or bad job, with its filter? How do the reviews shown prominently compare or contrast with the reviews at the bottom, or the reviews that are hidden?

### **Compare Yelp to Amazon**

Reviews do not exist only on Yelp, however. Take any review site and do the same exercise.

For instance, check out some reviews on Amazon, as a contrast to Yelp, by clicking on <http://jmlinks.com/4m> and <http://jmlinks.com/4n>. Notice how many reviews these people are writing; read their reviews. Do they look fake to you? Perhaps paid or solicited? Realize that all the review sites – Yelp, CitySearch, Google, Amazon – have essentially the same structure: profiles of businesses, reviewers with profiles, reviews by reviewers rated by stars, a filtering system, and a search process generated by user search queries and showing the “best” results based on keywords in their description and in their reviews, geographic proximity to the searcher, and number or quality of reviews. They all also struggle with real reviews, fake reviews, reviews by crazy bitter people who just like to trash businesses, and legitimate reviews, both good and bad.

Is this fair? Is it a better opportunity for your business than in 1994 when there were no online reviews? Whether it’s fair or not, good or not, is a different issue than how you as a local business can (and should) play the game of local reviews to win. You do not make the review world: you simply live in it.

# LIFE IS NOT FAIR. NEITHER ARE REVIEWS. GET OVER IT

None of this is perfect, and I am not singling out Yelp. I am drawing your attention to the Review Revolution and the fact that it is not just real people spontaneously reviewing businesses but rather a mix of people writing spontaneous real reviews, people writing solicited (yet real) reviews, and even fake people writing fake reviews.

## **Users Believe Reviews**

Users believe online reviews! According to a BrightLocal study, fully 92% of consumers now read online reviews (vs. 88% in 2014), and 68% say positive reviews make them trust a local business more (vs. 72% in 2014). You can read the full study at <http://jmlinks.com/5b>. Another excellent book on the social aspects of the Review Revolution is Bill Tancer's, *Everyone's a Critic*, at <http://jmlinks.com/37b>.

The reality is that users believe reviews, both good and bad, and both real and faked. The review ecosystem is a mess, yet as a business owner you have to realize (and accept) that reviews of all types impact your business. You can't change this fact; you can only work within the new "rules of the game."

That's the reality of the Review Revolution.

*Is it fair that many consumers are not sufficiently skeptical about the reviews they read? No.*

*Is it fair that Yelp, Amazon, Google, TripAdvisor and other vendors are not doing as much as they could to filter out fake reviews as well as address the lopsided problem that the most likely unsolicited review is often a negative one? No.*

*Do any of these companies care about your business or the fact that you now live within the Review Revolution? No.*

*Is life fair? No. Is the Review Revolution fair? No.*

*Do both life and the review revolution offers fabulous opportunities despite their flaws? Yes, yes, yes!*

## Unhappy Small Business Owners

In my face-to-face classes on social media, review sites are among the most controversial. Yelp, in particular, is literally hated by many small businesspeople because a) they have received what they think are unfair negative reviews on Yelp, and b) Yelp has a reputation for strong-arming businesses into paid advertising. (Yelp disputes this charge, though rumors have dogged the company for years – see <http://jmlinks.com/37c>).

Here's why local businesses often get quite emotional about sites like Yelp:

1. Often times, the only reviews they have about their business are negative reviews, which they feel are inaccurate or unfair.
2. They do not understand how to claim or optimize their listings, nor how to respond to reviews.
3. They do not understand how reviews work, and how to influence reviews in their favor.

Moreover, many small business owners do not step back and compare 2016 with 1994. Then, only the rich, famous, connected, or lucky got reviews in the local papers. Getting reviewed was like winning the lottery: great if it happened in a positive way, but not something upon which you could build a marketing strategy. Today, however, any business can get reviews, and consumers can read those reviews online. The reality is that the Review Revolution created an enormous **positive marketing opportunity** for your business.

Let me repeat that:

*The Review Revolution created an enormous positive marketing opportunity for your business!*

*If you know how to optimize your business listing and get reviews (more on this later).*

## Who Writes Reviews?

Let's talk about who writes reviews. Let's get real. Let's assume you are a local plumber. I have a clogged toilet. I go online and find your business. You come out, you fix my toilet, and you give me a bill for \$300. You did a good job, and I am happy about the service.

Will I go online to Yelp and write a review? It's doubtful. Unlike my relationship with a local French restaurant, I am not "proud" that I have a leaky toilet and I got it fixed. While I will likely go on Facebook and share a selfie of me and my wife at the local French restaurant, and likely go on Yelp and write a positive review to "showcase" how wealthy I am, and what a great husband I am, I am not "excited" that you provided me with excellent service with respect to my waste removal system in my bathroom, otherwise known as my toilet. No selfies to Facebook, hopefully no Snapchat of me on my newly fixed toilet, no positive review to Yelp.

As a happy customer, I am unlikely to leave a positive review.

*My toilet has been fixed. I'm happy. Done. Over. End. Writing a review is the last thing on my mind.*

Now, let's say you come out for my toilet repair, and you do NOT do what I consider a good job. Perhaps you crack my tile floor, or perhaps you get dirty water on my rug, or perhaps I just don't like you, or perhaps I find your fee of \$300 unreasonable.

*I'm mad. I hate you. I pay the bill. I'm angry and I want revenge.*

I think to myself, "I'll show you." I go online, and vent my anger in a Yelp review. I explain to fellow Yelpers (and the world) how terrible you are, how they should never use your business, etc. etc. I do this to "let off steam" as well as to "feel good about myself" that I am "doing the world a favor" by righting the wrong of your terrible business. I want you to go out of business. I want you to fail. That's justice to me, the unhappy customer.

(Don't believe this happens? To read reviews of the "worst food of my life" on Yelp, visit <http://jmlinks.com/4z>; to read reviews of the "best food of my life" on Yelp, visit <http://jmlinks.com/5a>.) You'll see both good, and bad, reviews on Yelp.

*Two scenarios: a positive experience, and a negative experience.*

Here are the **dirty little secrets** of the review ecosystem (with the possible exception of entertainment venues like restaurants, bars, museums, etc.):

- Consumers **believe** online reviews when making a purchase decision.
- However, outside of “fun” industries like restaurants and entertainment, the **most likely customer to leave an unsolicited review is the unhappy customer**. The very unhappy customer is very likely to spontaneously write a nasty review about your business!
- Outside of “fun” industries like restaurants and entertainment, **happy customers are NOT likely to write reviews**. They are not pre-motivated to share their experience with your plumbing company, your CPA firm, your DUI attorney services on Yelp without a nudge from you. (For restaurants, bars, and entertainment-type businesses, happy customers are much more likely to leave reviews.) Outside of “fun” industries, you must solicit reviews from happy customers to succeed.

Two other customer segments are likely to leave reviews.

- **Review geeks / Extreme Yelpers** – which would be people like myself, digitally connected and participatory in the Yelp (or Google, TripAdvisor) ecosystems. Review geeks are not necessarily primed to leave positive, or negative reviews. They just tend to review frequently. As Yelp has evolved, more and more people ARE leaving reviews spontaneously about local services, which is a good thing.
- The **hostile minority** - these are unhappy campers who, because of sites like Yelp, now have a way to vent their rage at nearly everything. These “unhappy campers” tend to leave unhappy review after unhappy review: bitter and negative, they tend to hate everything and leave a destructive trail of negative reviews in their wake. Unfortunately, without any fault on its part, Yelp enabled the very unhappy, bitter people of the world to spread their negativity by venting against businesses. Don’t believe me? Try some Yelp searches, look for negative reviews, and click “up” to the profiles of the reviewers. In just a few minutes, I guarantee that you will find some very negative, pathetic sad little people.

# UNHAPPY CUSTOMERS OFTEN WRITE REVIEWS

Yelp was built around restaurants, the one case in which satisfied customers are likely to leave reviews. Why? To show “to the world” that they have the disposable income and prestige to dine out – i.e., *social media narcissism*. Similar to what you see on Facebook, people like to “showcase” their positive achievements. *Look at me! I went to Disneyland, I went out to dinner, I went to this amazing museum, ate at this exclusive restaurant.*

Still, even in the entertainment sectors, unhappy customers are very likely to leave reviews.

The take-away here is to realize the following:

*If you do nothing, the most likely reviews you will get will be negative reviews.*

Let me repeat that because it is incredibly important to understand the dirty little secret of the Review Revolution:

*If you do nothing, the most likely reviews you will get will be negative reviews.*

## **Don't Shoot the Messenger**

Now, don't shoot the messenger. Every business will get at least a few negative reviews, sooner or later. If you have just a couple, that's OK and normal (compare yourself to other, similar businesses to establish a baseline). But if you're getting negative review after negative review after negative review, you don't have a Yelp or online review problem, you have a business problem. Don't shoot the messenger; the Review Revolution gives you a new window on how actual customers feel about your product, service, or front-line, customer-facing employees.

## Official Policy

Now, let's return to the Review Revolution, and look at the problem from the perspective of a business owner in some "non-fun" line of business such as plumbers, CPAs or accountants, divorce attorneys, or hair salons. You're unlikely to get positive reviews, unless you do something pro-active. But what's the official policy on reviews?

The official policies of Yelp, Google, TripAdvisor and the like is that you – as the business owner – are not allowed to solicit reviews in any way shape or fashion. Yelp, for example, advises business owners:

*Don't ask your customers to review your business on Yelp. Over time, solicited reviews create bias in your business listing – a bias that savvy consumers can smell from a mile away. (Source: <http://jmlinks.com/4g>).*

TripAdvisor states as follows:

*The following actions may be considered fraudulent:*

*– Attempts by an owner to boost his/her own property's reputation by:*

- *Writing a review for his/her own property*
- *Asking friends or relatives to write positive reviews*
- *Submitting a review on behalf of a guest*
- *Copying comment cards and submitting them as reviews*
- *Pressuring a TripAdvisor member to remove a negative review*
- *Offering incentives such as discounts, upgrades, or any special treatment in exchange for reviews*
- *Hiring an optimization company, third party marketing organization, or anyone to submit false reviews*
- *Impersonating a competitor or a guest in any way*

*– Attempts by an owner to damage his/her competitors by submitting a negative review.*

*Bottom line: Any attempt to mislead, influence or impersonate a traveler is considered fraudulent and will be subject to penalty. (Source: <http://jmlinks.com/4h>).*

Even Amazon has changed its once more lenient policy to one in which it is now taboo to give away free products in exchange for a review (<http://jmlinks.com/37d>). Amazon states, “In order to preserve the integrity of Community content, content and activities consisting of advertising, promotion, or solicitation (whether direct or indirect) is not allowed, including... Offering compensation or requesting compensation (including free or discounted products) in exchange for creating, modifying, or posting content.”

## **The Review Dilemma**

So here's the **review dilemma**:

- *On the one hand*, if you do nothing, you are very likely to receive negative reviews from unhappy customers and not so likely to receive positive reviews from happy customers (true in all cases, except perhaps entertainment-type industries), but
- *On the other hand*, the official terms of service forbid you from soliciting reviews from customers.

*Damned if you do, damned if you don't.*

The reality of the Review Revolution is that in most cases and certainly in competitive industries like divorce law, DUI cases, plumbers, roofers, etc., most successful companies are pro-actively soliciting reviews. This does not mean that they are faking or buying reviews; it only means that they are nudging, cajoling, begging, emotionally incentivizing, and otherwise motivating happy customers to go online and take the time to write positive reviews around their business.

*Is this fair? No.*

*Is this in accord with the terms of service? No.*

*Is it the reality? Yes.*

*Is it the public reality? No. Yelp, Google, TripAdvisor, Amazon, and all the other companies do their best to police reviews, but the reality is that the fact that reviews are heavily manipulated by vendors is an open secret.*

But wait a second.

*Is life fair? No.*

*Was it likely that your plumbing company would have been reviewed in the paper in 1995? No. Your small restaurant? No.*

*Even though the posted speed limit on the highway is 60 mph, do most cars actually go 60 mph? No.*

The Review Revolution has given you an enormous, positive opportunity to reach new customers, just like the Interstate Highway System gives you the opportunity to travel cross-country at 65 to 80 mph even though the posted speed limit may be 75 mph (in the West) and 60 mph (in the East).

*Don't be the fastest car on the road. Don't be the red Mazda Miata going 95 mph in front of the cop. Just be in the fast car group, just not the fastest, most egregious car.*

For now, just understand that **positive reviews are the key to success**, that soliciting reviews is technically against the terms of service, and begin to realize that you are going to have to create a strategy to solicit positive reviews, despite the posted terms of service.

Let's turn, first, to identifying companies to emulate on the various review sites.

## » INVENTORY COMPANIES ON YELP, GOOGLE OR OTHER RELEVANT SITES

If you are a local business, it will be pretty obvious that reviews matter. Even if you are a national business, you may realize that reviews matter. Your first step therefore is to identify the review sites that matter to your business. Your second step is to then browse similar businesses on those sites and conduct an inventory of what you like and dislike

about their listings, realizing that unlike on Facebook, listings on review sites generally occur with or without the permission of the business. Actual control is much more limited.

Among the most important review sites are:

Yelp (<http://www.yelp.com/>) – the largest local review site with great strength in restaurants, more popular in “Blue” states like New York or California than in “Red” states like Florida or Texas.

Google (<http://www.google.com/>). Accessibly by doing Google searches on relevant keywords. In some cases, you’ll need to first find a company, and then Google its name to find its Google page (more below).

Facebook (<https://www.facebook.com>). Rather new to the review ecosystem, Facebook is beefing up its reviews of local businesses. See <http://jmlinks.com/37e> for Facebook’s help file on business reviews.

TripAdvisor (<http://www.tripadvisor.com/>). The leading travel review site.

YP (<http://www.yelp.com/>). The traditional yellow pages gone digital.

VRBO (<http://www.vrbo.com/>) – a site for identifying short term vacation rentals.

Airbnb (<http://www.airbnb.com/>) – the leading site for vacation rentals.

Amazon (<http://www.amazon.com/>) – earth’s largest retailer, with reviews on billions of products.

GlassDoor (<http://www.glassdoor.com/>) – reviews about businesses from the perspective of employees.

Facebook is a special, and growing case of reviews. Consumers don’t pro-actively search Facebook (yet) for reviews, but they are beginning to leave them. So Facebook reviews function generally only as “trust” indicators, and/or encourage eWOM (electronic word of mouth). To enable Facebook reviews for your business, see <http://jmlinks.com/32p>.

# IDENTIFY COMPANIES WHO DO REVIEW MARKETING WELL, AND REVERSE ENGINEER THEM

The easiest way to find logical review sites for your company is as follows:

1. Identify the **keywords** by which prospective customers might search for you. For example, if you are a Sushi restaurant in San Francisco, those keywords might be words such as “Sushi,” “Sushi Bar,” “Japanese Restaurant,” “Japanese Caterers,” etc.
2. **Google** those keywords and note which review sites come up.
3. Click over to the listing sites, and **make a list** of them.
4. Go over to each review site, re-input your search query keywords, and begin to browse company listings on the review site(s) you have identified.

For example, take “vacation rentals Lake Tahoe” and search it on Google (<http://jmlinks.com/4p>). Then, browse the search results and you’ll see:

<https://www.flipkey.com/>

<http://www.homeaway.com/>

<http://www.vrbo.com/>

<http://www.tripadvisor.com/>

<https://www.tahoeaccommodations.com/>

<http://www.vacationrentals.com/>

<https://www.airbnb.com/>

Obviously, the sites returned will vary with your keywords. By using this technique, however, you can use Google to identify the most important review sites and directories in your industry. Your **TODOS** here are

1. Take out a piece of paper, or set up a Word or Google document. Title this “keyword list.”
2. Using tools like the Google *keyword planner*, Google *suggest* (the terms suggested by Google when you type), or Google *related searches* (the terms that appear at the very bottom of the page) as well as just brainstorming “how customers might search for you,” create a keyword list of relevant terms. (To watch a video on how to use the Keyword Planner, visit <http://jmlinks.com/5c>, and to watch a video on how to build a Keyword Worksheet, visit <http://jmlinks.com/5d>). For a full list of keyword discovery tools, visit my SEO dashboard at <http://jmlinks.com/seodash> and scroll down to the “Keywords” section.
3. Conduct these searches on Google, and create an organize list of relevant search queries customers might use on Google, Yelp, etc.
4. As you search, write down the top review / directory sites that come up. Build a list of relevant review sites in your industry.

You now have an organized list of which reviews sites matter to you and your business. This list will, of course, be different for a *Bed and Breakfast* vs. a *CPA* vs. a *divorce attorney* vs. a *sushi restaurant*, but the review marketing game has the same rules across all review sites.

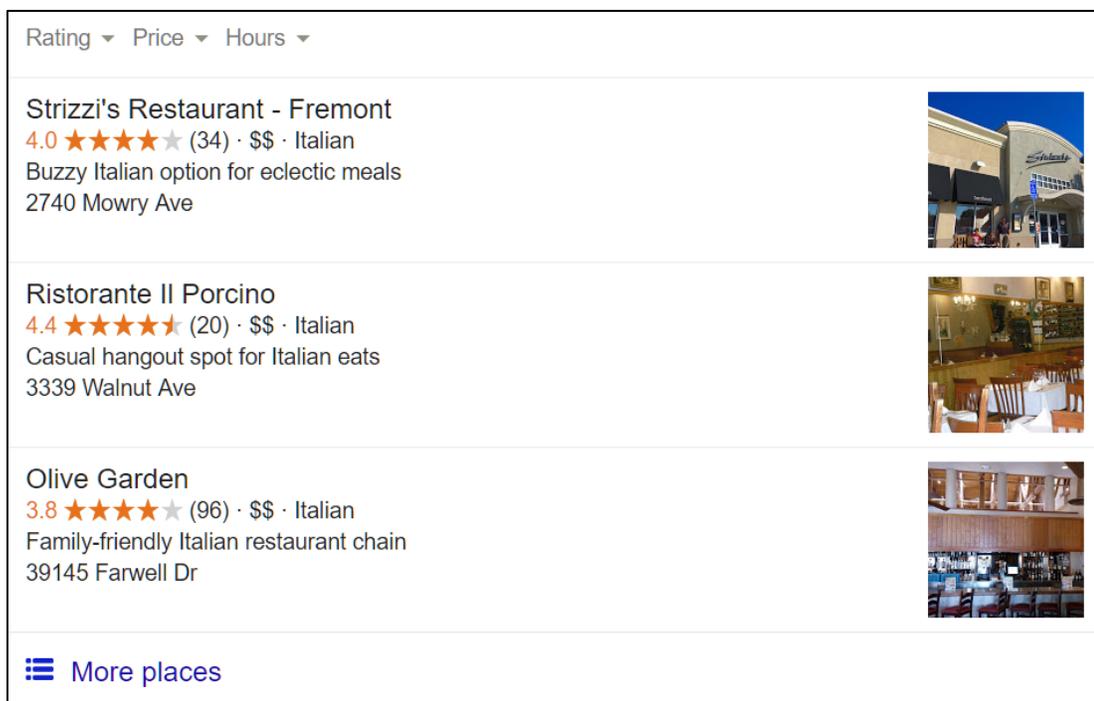
## Google is Special

Among listing and review sites, Google / Google+ is special. First and foremost, it’s owned and operated by Google and has clear priority on Google search. Having a strong Google local presence is the No. 1 way for your business to show on local-related Google searches. It doesn’t take much to look forward and realize that if local matters to you, and your customers use Google, you’ll need to optimize your Google local listing!

However, Google has done a **terrible** job of managing Google local (now renamed to Google My Business (<https://www.google.com/business>)). They are constantly changing the format, rules, structure, setup – enough to drive a social media marketer insane!

As of October, 2017, here’s the current set up:

**Consumers simply browse Google.** Consumers simply go to Google, type in keywords such as “Pizza,” “Italian restaurants,” or “Family Law Attorneys” and see companies show up in the “snack pack,” which is the three listings showing (usually but not always with stars). Here’s a screenshot:



**Consumers need a Google account to post reviews.** Consumers can post reviews to Google / Google with either a Google+ account or just a Google account. But, they must have one type of Google account to be able to post a review. Anyone, however, can read a review.

**Consumers rate businesses.** Consumers rate businesses on a five star system, and can leave detailed reviews (good, bad, ugly) on the system, whether or not the business likes it.

**Businesses can “claim” their Google listings at Google My Businesses.** To “claim” their listings, businesses go to Google My Business at <https://www.google.com/business> which is the moribund Google+ system, and they can add a description (now invisible to consumers), photos (visible on Google), and respond to reviews. If so desired, businesses can post to Google as a

social network (like Facebook) via this system, but the reality is that Google is essentially dead as a social network (but very alive as a review system). Its only real value is in the review ecosystem.

**Businesses can post announcements to their Google My Business Listing.** New for 2017, Google now allows a local business to make a post to its business which will show up when someone Google's the business name as well as often (but not always) when someone does a relevant search on Google and your business wins a placement on Google Maps. See <http://jmlinks.com/37f> for information on this new opportunity.

However it evolves, if local matters to you, you must master Google / Google+ reviews. Here's why:

1. **Reviews drive your company to the top of Google.** The *more* reviews you have on the Google system, the *higher* you show on Google searches for local keywords.
2. **Consumers read and rely on Google reviews,** even if they don't understand where they came from or how to write them. The reality is that while *few* consumers *write* reviews, *many* if not most people *believe* them.

## Inventory Companies and Their Local Listings

As you browse local review sites, identify relevant companies and make a list of their listings on Yelp, Google, or other sites that are relevant. Make note of:

- Does their **listing** appear **claimed**?
- **Photos:** cover photos and profile pictures. Do you like what you see? Why or why not?
- **Reviews.** How many reviews do they have? Are the mostly positive or mostly negative? Click on the reviewers. Do they seem "real"? Unsolicited? Solicited? Faked? Try to reverse engineer how they might be soliciting or encouraging reviews.
- **About Tab.** Check out their about tab, or listing. Read it. Do you like how it's written? Does it include relevant keywords?

For your second **TODO**, download the **Review Research Worksheet**. For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code ‘**2018social**’ to register if you have not already done so), and click on the link to the “Reviews Research Worksheet.” You’ll answer questions as to whether your potential customers are using reviews, which review sites are important, and inventory what you like and dislike about their review marketing set up and marketing strategy.

## » CLAIM AND OPTIMIZE YOUR LISTINGS

Now that you’ve identified which local review sites matter, it’s time to claim and optimize your listings. All of the sites work in essentially the same way, although there are differences in the details. The basic steps are:

1. Identify the local review site for which you want to “claim” your company listing.
2. Find your listing on the site.
3. Follow the instructions to “claim” it, usually by phone or postcard verification.
4. Optimize your listing description by writing keyword-heavy text, uploading photographs, and populating your listing with your hours of operation and other details.
5. Make sure that your website links back to your listing, and your listing links to your website.
6. Make sure that the business name, address, and phone number are the same on both the listing site and your website (be consistent).

### To do this for Yelp:

1. Go to <http://biz.yelp.com/>
2. Enter your business name, and address and hit **Get Started** in red.
3. Follow the instructions to claim your business, usually by phone verification.
4. Once you have claimed your listing:
  - a. Click on Business Information on the left; re-write your description to contain logical keywords that potential customers might search for, including synonyms (*pizza, Italian restaurant, catering*, for example).
  - b. Choose relevant categories from the list provided.
  - c. Enter your basic information, hours, specialties (business information), history, and “meet the business owner” with an eye to logical keywords.

- d. Click on photos on the left, and upload nice photos.
5. Make sure that the address and phone on Yelp are the SAME as the address and phone on your website.
6. Make sure that your website links to your Yelp listing (usually in the footer), and that your Yelp listing links to your website.

**VIDEO.** Watch a video tutorial on how to claim and optimize your business on Yelp at <http://jmlinks.com/16x>.

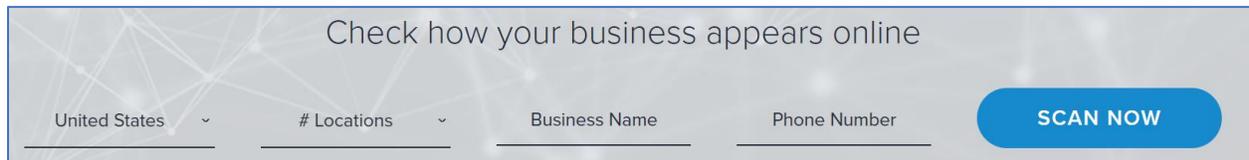
### To do this for Google:

1. Sign in to your Google account or Gmail (if you use Gmail).
2. Go to <https://www.google.com/business>
3. Click on the green “Start Now” link on the top right. Or, if you don’t see that, click on the blue Circle / + at the bottom right.
4. Be sure to select “Add a location” or “Local Business”
5. Enter your business name and address.
6. Follow the instructions to claim your business, usually by postcard verification.
7. When you get the postcard, enter the PIN as indicated in the instructions.
8. Optimize your business description by clicking on the red “edit” button.’
9. Choose relevant categories.
10. Click on “manage photos” to change your profile picture, and cover photos, as well as add interior and/or exterior photos.
11. Make sure that the address and phone on Google are the SAME as the address and phone on your website.
12. Make sure that your website links to your Google listing (usually in the footer), and that your Yelp listing links to your website.

**VIDEO.** Watch a video tutorial on how to claim and optimize your business on Google at <http://jmlinks.com/17d>.

**VIDEO.** Watch a video tutorial on why Yelp matters for both SEO and social media marketing at <http://jmlinks.com/17e>. Note that Yelp drives reviews on the Bing Search Engine. For example, check out this Bing search for *Pizza* at <http://jmlinks.com/37h>.

Other local listings like YP.com or Citysearch follow similar procedures. To find all of your “second tier” listings, you can go to Yext (<http://www.yext.com/>) and enter your business name and phone number in the box on the right. Then click on the “scan now” blue button on the right. Here’s a screenshot:



The screenshot shows a web form titled "Check how your business appears online". It features four input fields: "United States" with a dropdown arrow, "# Locations" with a dropdown arrow, "Business Name", and "Phone Number". To the right of these fields is a prominent blue button labeled "SCAN NOW". The background of the form has a faint network diagram.

For free, Yext will identify all your local listings. You can then click over to each and claim and optimize each. Or, if you have budget, you can subscribe to Yext and they will do this for all local listings including Yelp but **excluding** Google. A competitive service to Yext is MOZ Local at <http://jmlinks.com/37g>. Whitespark at <https://whitespark.ca> is yet another one.

## Citation Consistency and Google Local Searches

To show up on Google search, it is important that ALL review sites and your website have the SAME company name, the SAME phone number, and SAME physical address. Make sure that your company name, phone number, and physical address appear on your website, usually in the footer. (This is called your *NAP (Name, Address, Phone)*).

“Citation” refers to the external listings on review websites that confirm (to Google and Bing) that your business has a certain phone number and physical address. This is used by the search engines to filter local search results by their proximity to the searcher or the geographic terms used in the search query.

Using a service like Yext allows you to claim, optimize, and make consistent this information across hundreds of review sites. This consistency is a big help to showing at the top of local searches on Google or Bing / Yahoo. Alternatives to Yext are Moz Local and Whitespark (<https://whitespark.ca/>); Yext tends to be the easiest, fastest, and most expensive. All of these are excellent ways to claim your 2<sup>nd</sup>-tier listings, after Google and Yelp (the two most important local review sites).

## Organize and Claim Your Local Listings

For your third **TODO**, make a spreadsheet of ALL relevant local review sites. Go to each, and claim / optimize your local listings. Be sure to note your login and password!

- CLAIM YOUR GOOGLE AND YELP WITH A PERMANENT CORPORATE EMAIL (NOT AN EMPLOYEE EMAIL)
- **DO NOT LOSE YOUR GOOGLE AND YELP LOGIN AND PASSWORDS!**

**Lost password retrieval** on Yelp and Google is a **disaster!** Neither system has a good password retrieval function; on Yelp in particular, if your password is lost, God help you. Do not lose your passwords! Write them down somewhere where you will be able to find them in a few years.

## » SEO YOUR LOCAL WEBSITE

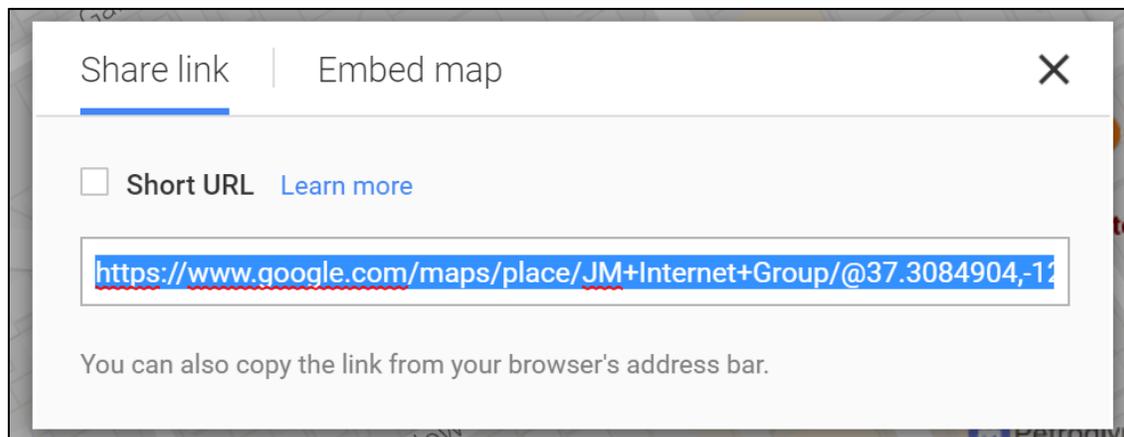
SEO or *Search Engine Optimization* is the art and science of structuring your website so that it ranks well on Google searches. *Local* is an area that crosses both SEO and social media marketing. (See my *SEO Fitness Workbook* at <http://jmlinks.com/seo> for a full discussion of SEO). While you are working on your review marketing efforts, be sure to SEO your website as follows:

- **Optimize Your Home Page.** Make sure that your Home Page, especially the TITLE tag contains your keywords and your city. If you are a Miami plumber, make sure that both the word “Miami” and the word “plumber” appears in the visible text of your home page.
- **Create a Consistent NAP.** Include a consistent NAP (Name / Address / Phone Number) on your website that matches the NAP on your Yelp, Google, and other local review sites. Cross-link from your website to your Google and Yelp listings. Make sure that all your listings, especially Google and Yelp, link directly to your website.

## Optimize Your Contact Us Page

Be sure to have an “about us” or “contact us” page on your website. Optimize that page for your target home city by including the city name and keywords in your TITLE tag, plus

visible content. Also, on that page, include an embedded Google map, which you can generate by searching for your company on Google, clicking up to the maps tab, and then click the share tab. Next, click on “embed map” to get the HTML code to embed a Google map on your website. Here’s a screenshot:



Finally, use the microdata / schema.org system to embed the appropriate JSON-LD schema markup on your website. J.D. Flynn has created an online tool that will guide you through creating Schema data for you at <http://jmlinks.com/32q>. (For two quick guides to local SEO, see <http://jmlinks.com/32r> (short and simple) and <http://jmlinks.com/32s> (long and detailed)).

## » CULTIVATE POSITIVE REVIEWS

Returning to the social media and review aspects of local, we’ll assume you’ve claimed and optimized the relevant listing services for your local business. Most often this will be at least Google and Yelp, and in specific industries it might include TripAdvisor, VRBO, or Airbnb. If you sell products, it might be your product listings and uploads on Amazon. Or it might be on Glassdoor.com.

At this point, you have two options:

1. Wait **passively** for positive customer reviews, and hope that the positive reviews will outpace the negative reviews (according to the official policy of Yelp, Google, etc.).
2. Be **pro-active** and try to encourage your happy customers to post reviews.

Which do you think the winners in local search and social media are doing?

## **Legal Disclaimer**

*You are responsible for everything you do in terms of your Internet marketing. Nothing I am writing here should be construed as required or recommended advice. Legally, I am recommending that you do nothing (option #1).*

*Take responsibility for your own actions as a marketer, and act on your own risk!*

## **Soliciting Reviews**

That said, here is the reality. If you wait passively for reviews (unless you are in the entertainment industry like a restaurant or bar), the most likely scenarios will be a) no reviews, or b) bad reviews, or at least a preponderance of bad reviews. The reason for this is if a customer's plumbing experience is good, she's happy and she goes on with her life. If her plumbing experience is bad, however, she might get angry and be motivated to go on Yelp, Google, CitySearch, etc., and "tell the world" about how much she hates the company that did her wrong.

*This dynamic is the dirty little secret of review marketing: unhappy customers are the ones most likely to leave unsolicited reviews.*

You the business owner or marketer can, however, fight back against this dynamic. Here are some strategies to solicit positive reviews about your business:

**Face to Face.** This is the most powerful way to get positive reviews. The employee who is "face to face" with the customer builds rapport with customer. A scenario might be:

*Technician: “OK, I’ve fixed your toilet. Let’s run through it together, and verify it’s in working order.*

*Client: Yes, it’s great. Thank you so much!*

*Technician: You’re welcome. Hey, if you have a moment, could you do us a HUGE FAVOR and write a review on Google or Yelp about your experience?*

*Client: Yes.*

- If client knows how to do this, just give him or her a card with a direct link to the review site location.
- If client does not know how to do this, give him or her a card with step-by-step instructions.

**Phone Reminders.** Either at the time of service, or shortly thereafter, call the customer to see “how it went,” and if they’re happy, ask them to write a review online.

**Paper Reminders.** Either at the time of service, or shortly thereafter, mail a physical postcard thanking the client for their business, and asking them to write a review on Yelp, Google, etc.

**Email Reminders.** Either at the time of service, or shortly thereafter, send an email thanking the client for their business, and asking them to write a review online.

The reality is that face-to-face is, by far, the strongest way to motivate customers to write reviews, phone contact the next strongest, and so on and so forth.

## **Help Customers Write Reviews**

Many customers may not understand how to write a review, so a step-by-step instruction sheet would be helpful. Use a URL shortener like <http://bit.ly>, or <http://tinyurl.com> to shorten the link to your local review listing page.

## **Google: Generate a REVIEW US URL on Google**

Google, as I have explained earlier, is really a mess. To find a short, easy link to your customer reviews on Google follow these steps.

1. Go to the GradeUS Google review generator tool at **<http://jmlinks.com/13j>**.
2. Enter your business name and city or postal code, and press the blue “Get Google Review Links.”
3. Select your company from the list it provides, and hit “Continue.”
4. Click on the link for “Open in Search Results” and highlight the huge URL string it gives you from Google.
5. Copy this URL string.
6. Go to **<http://tinyurl.com/>** and past this URL into the box “Enter a long URL to make it tiny.”
  - a. If you like “customize” your URL to make it easy to remember / or just cool.
  - b. Here’s an example: **<http://tinyurl.com/revjasonseo>**.

*Alternatively –*

1. Go to Google at **<https://www.google.com/>** and enter your company name plus a keyword and/or your city.
2. Click on the “blue” Google reviews link (you MUST have at least ONE Google Review to use this method!).
3. Highlight the huge URL Google gives you in the top of the browser.
4. Copy this URL string.
5. Go to **<http://tinyurl.com/>** and past this URL into the box “Enter a long URL to make it tiny.”
  - a. If you like “customize” your URL to make it easy to remember / or just cool.
  - b. Here’s an example: **<http://tinyurl.com/revjasonseo>**.

You can write this in an email or on a printed sheet of paper. Here’s an example of an email I might send to my clients:

Greetings!

Thank you so much for the opportunity to serve your Internet marketing and consulting needs. As the owner of the *Jason McDonald SEO Consulting Agency*, I truly appreciate your business!

If you have a moment, I would REALLY appreciate an honest review on one of the local listing sites. Here are the instructions:

Google.

1. Sign in to your Google and/or Gmail account at <https://www.google.com/>.
2. Go to <http://tinyurl.com/revjasonseo>.
3. Click on the white "Write a review"
4. Write your review

Yelp:

1. Sign into your Yelp account at <http://www.yelp.com/>.
2. Go to <http://bit.ly/jason-yelp>.
3. Click on the red "write a review" button
4. Write your review

Thank you,

Jason McDonald

## TO GET POSITIVE REVIEWS, ASK HAPPY CUSTOMERS TO REVIEW YOU

A few free services have tools to help you create nice-looking Web pages and handouts to encourage reviews:

Bright Local at <http://jmlinks.com/4s>.

WhiteSpark at <http://jmlinks.com/4t>.

A few paid services are emerging that “pre-survey” your customers. Essentially, they first ask your customer if they liked your company and its product or service. If yes, then that customer is prompted to write a review. If no, then the customer is given a longer detailed survey and that that survey is sent to you the business owner; the customer is NOT prompted to write a review. One such service is ReviewBuzz (<http://www.reviewbuzz.com>). Others are ReviewInc (<http://www.reviewinc.com>) and YotPo (<https://www.yotpo.com/>).

### **Be Judicious. Understand “Plausible Deniability”**

Understand that according to the official policy, even a mild handout asking for an “honest review” is a violation of the terms of service of most of the review providers! Therefore, I do NOT recommend that you post these publicly on your website. Be judicious: give them out in printed or email format, and only to those happy customers who have been pre-selected by your staff.

Obviously, if a client is unhappy and you cannot fix it to make them happy: DO NOT ASK THEM FOR A REVIEW.

In fact, a really smart strategy is as follows:

- **Conduct a survey** of customers after they use your service asking them a) if they are happy, b) if they would write a review, and c) if they know how. This could be done formally (an email survey on a site like SurveyMonkey (<http://www.surveymonkey.com>)) or informally just be pre-asking the customer face-to-face, over the phone, or via email. You can also use Jotform and “conditional logic” to set up this type of pre-survey on your website (See <http://jmlinks.com/37j>).
- **If they ARE happy**, then ask them nicely to **write a review**.
- **If they are NOT happy**, either a) make them happy, or b) do **NOT** ask them for a review.

In this way, you avoid motivating unhappy customers to review you online. Indeed, if you are in a sensitive industry (e.g., Bail Bonds, apartment rentals) in which many customers are not happy, I do not recommend you even publicize to your clients face-to-face or in the real world that you are on the review sites. If many of your customers will be negative, then do not make it “easy” for them to give you a negative review!

## **Paying for Reviews**

Let’s face it. Review marketing is the “contact sport” of social media marketing. In certain industries (e.g., DUI attorneys, private detectives, breast augmentation services), many reviews are solicited if not faked, and sometimes incentivized with monetary incentives.

Should you pay for reviews? Generally speaking, I would not pay for reviews. (I am talking about real clients not completely faked reviews). Some companies do incentivize by giving \$25 Starbucks or Amazon gift cards once a review is published; however, if this becomes known to a Yelp or a Google you wrong a very strong risk of being severely penalized.

*Offering monetary incentives to get reviews is a dangerous strategy, so be forewarned.*

Yelp will even mark your listing with an aggressive naughty notice if you are busted paying for reviews. You can browse real examples of this on Yelp at <http://jmlinks.com/4u>. First and foremost, therefore, if you choose to “go to the dark side” and offer payments, I would not publicize it! And: **I AM NOT RECOMMENDING THAT YOU DO THIS**. I am just pointing out that it is done.

Also, note that not only is “paying for reviews” likely to bring down the wrath of Yelp, you can also bring down the wrath of Yelp by offering to pay a negative reviewer to take down their review. Anytime you are offering money in exchange for a Yelp behavior then you run that risk – so be forewarned about just how uptight Yelp is about reviews and payments! (Google and other sites have similar policies).

## **Incentivize Employees**

A better way to incentivize is to offer your employees an incentive, rather than the customer, for reviews published online. Assume for example you are a local pizza joint. Offer your employees a \$25.00 bonus EACH after each positive review on Yelp. Or if you

are a roofing company, give the technician a handout explaining how to write a review online, and give him a \$25.00 bonus EACH TIME a customer posts a review. In that way, you motivate your front-line employees to be customer-friendly, and when there is a positive customer experience, to politely ask the customer to write an honest review on Yelp, Google, etc.

### **Motivate your employees to ask for reviews!**

I would not put any pro-active review solicitation strategy in writing on the Internet, just as I would not call the California Highway Patrol and inform them that, in general, I go five miles faster than the posted speed limit while driving the highways and byways of the Golden State.

*Let sleeping dogs lie.*

But just as going 65 mph in a 60 mph zone is unlikely to cause a police action, polite nudges to encourage real reviews from real customers are unlikely to be a big problem. If you do it, just keep it private.

### **Don't Overthink It. Just Ask for Reviews from Real Customers**

In my experience, if most businesses would simply *ask* a few clients for reviews, they would get them. Yes, you'll ask ten clients to get one review. But you'll get that one review. The real problem is to motivate employees to ask and ask and ask and ask to get that one review to go live on Yelp, Google, or other review sites.

Recognize, understand, and accept that you will ask ten people to get just one review. That's just how it is: customers are self-centered and lazy (but we love them).

### **Why Reviews Matter (a Lot)**

Getting positive reviews is hard work. It's not done in a day. Slow and steady will win the race. Just create a culture at your business of great customer service and an awareness of that "special moment" when a customer is happy to ask for a positive honest review.

Reviews, however, are worth their weight in **gold**. No, in **platinum**. Here's why:

1. **Reviews are a “trust indicator.”** For better or worse, consumers tend to believe reviews and use them as trust indicators about your business. A company that has many positive reviews will crush a company that has negative reviews, and outperform a company that has just a few or zero reviews.
2. **Reviews help you in search.** The MORE reviews you have the HIGHER you will show at the top of Google, Yelp, CitySearch, AirBnB, TripAdvisor, Amazon, and even iTunes!

## REVIEWS ARE WORTH THEIR WEIGHT IN PLATINUM

Do anything and everything honestly and ethically possible to encourage your best customers to “spread the word” by writing reviews about your business online. After just a few positive reviews, you will be amazed at what they do for your business.

### **Responding to Negative Reviews**

Negative reviews will happen. As the business owner, you may feel as if someone walked up to your newborn baby sleeping calmly in her stroller and said to you:

*Your baby is ugly. Your baby stinks. I hate your baby. I had a bad experience with your baby, and I am going to tell the world how much the baby that you are working for blood, sweat, and tears is terrible.*

Here's an example:



**Lupita L.**  
Los Angeles, CA  
75 friends  
95 reviews

3/22/2016  
1 check-in

If I could, I would give this truck a 00!!! Worst tacos in the world! Do yourself a favor don't come. Meat was awful. Mulitas had no cheese. To top it off, a large group arrived after me and their food was served b4 my tacos so I had to wait forever. I don't understand how some people give them 4 & 5 stars.

You're human. You're close to your business. It is like your baby. Your first reaction will be **ANGER**.

Resist the temptation to respond in kind. Do not go online and argue with the negative consumer. Do not insult them. Do not use unprofessional language. *When you wrestle with a pig, the pig gets dirty and the pig likes it.*

Instead:

- **Calm down.** Wait at least 24 hours before doing anything. Sleep on it.
- **Have someone else deal with negative reviews:** an outside consultant or employee who is not emotionally involved. Let a calm head prevail, and it probably will not be the head of the business owner.
- **Try to fix the problem.** If at all possible, reason with the person (you can usually contact them via Yelp, Google, etc.), and see if you can fix the problem. In some cases, you can, and then you can politely ask them to change the review.
- **Respond.** State your side of the situation in a positive, professional manner while acknowledging the right of the reviewer to her own opinion.

Remember: every business will get a few negative reviews, but if your business has more than the average... you may have a “business” problem and not a “review” problem.

**Don't shoot the (review) messenger.**

## Do Not Validate the Bad Review

Please note that if you have a negative review on a site like Yelp, Google, Amazon, etc., and the reviewer has a **weak profile** (e.g., *this is their first review, few friends, etc.*), if you respond to it, you are *validating* that review and making it *more likely* to appear high in your profile. Generally speaking, therefore, I recommend waiting at least a month before responding to a negative review by someone with a weak profile. There is a chance it will be filtered out as fake (especially on Yelp). But if after a month, it is still there, then consider a response.

## Responding to Reviews

To **respond to a negative review**, do as follows. First and foremost, take the high ground. You can log into your business account / profile and respond to negative reviews. This is one of the benefits of “claiming” your business profile. But be positive and professional: acknowledge their right to their opinion, but be firm as to your right to state your opinion as well. Second, state your side of the situation but realize you are NOT talking to the unhappy customer. You are talking to the person reading your reviews and deciding whether to reach out to you for a possible business engagement. Explain your side of the story. Often times, the negative reviews come from nasty, unhappy people (which you can politely point out as for example, by asking the reader to click on the reviewer’s name and see all their other negative reviews to realize that this is just a negative person). Or, the person wasn’t a good fit for your business (so explain why). Or the person is being plain crazy. For example, I have had plastic surgeons condemned on Yelp because their waiting room was too hot, or other clients condemned because they didn’t respond to an email. Finally, if the review is fake (i.e., by a competitor) or obscene or racist, you can complain to Yelp, Google, etc., and in some cases they will remove the reviews. (To do this, log in to a personal account on Yelp, and right click on the offensive review. You can then flag it and complain).

To read Yelp’s official guide to responding to reviews, visit <http://jmlinks.com/5e>. To read Google’s, visit <http://jmlinks.com/5f>. To read TripAdvisor’s, visit <http://jmlinks.com/5g>. For whatever review site matters to your business, you can usually search their help files for advice on how to respond to reviews. However, remember that the official policies are often very naive about how the game is truly played.

# SWAMP NEGATIVE REVIEWS WITH POSITIVE REVIEWS

A better strategy is to ignore the bad reviews, and focus on soliciting positive reviews to “swamp” the negative reviews in an ocean of positivity. Again, in no way shape or form, am I advising you to be dishonest or solicit fake reviews. I am simply advising you to ask happy customers to just take a few minutes and tell their happy stories. If you pro-actively solicit positive, real reviews you can drown out or swamp the negative reviews with a preponderance of positive reviews. In short, getting positive real reviews is the best way to respond to negative reviews.

*You don't ask, you don't get.*

For your fourth **TODO**, download the **Review Solicitation Worksheet**. For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code ‘**2018social**’ to register if you have not already done so), and click on the link to the “Reviews Solicitation Worksheet.” You’ll create a strategy to encourage positive reviews about your company.

## » MONITOR AND IMPROVE YOUR ONLINE REPUTATION

**Reputation management** is a new buzzword about protecting one’s online reputation, whether for an individual or a business. To understand reputation management, first back up and consider the sales funnel, often explained as *AIDA: Awareness, Interest, Desire and Action*. Prospective customers go through distinct phases as they consider solutions for their problems, needs, or desires:

**Awareness.** An **awareness** of the problem and the beginning of Internet searches and social media outreach to friends, family, and colleagues about the problem, need, or desire and possible solutions. In this phase, searches are often “educational” in nature as in “how to cater a wedding” or “wedding ideas.”

**Interest.** As a customer becomes aware of available market solutions, they develop an **interest** in vendor offerings, and even may make a shortlist. At this stage, and the next, they move closer to an “action,” i.e. a purchase or engagement with a vendor solution. Searches at this point become “best wedding caterers” or “Boston catering companies,” etc.

**Desire.** Interest shifts towards **desire**, and the customer begins to narrow down his or her shortlist. At this point, searches become *reputational* in nature. They may search a business name PLUS words like *reviews* or *complaints*. If your business were named Gina’s Italian Kitchen, for example. They might search Google for “Gina’s Italian Kitchen Reviews” or “Complaints against Gina’s Italian Kitchen,” or “Gina’s Italian Kitchen Wedding Catering Reviews.” **Reviews** is the operative word; if he or she finds *positive* reviews, that confirms your business is a good choice, whereas if he or she finds *negative* reviews, they may take you out of the consideration set entirely.

**Action.** A choice is made to purchase the service or engage with your business. Upon completion, the customer may decide to leave her own review about your business for others.

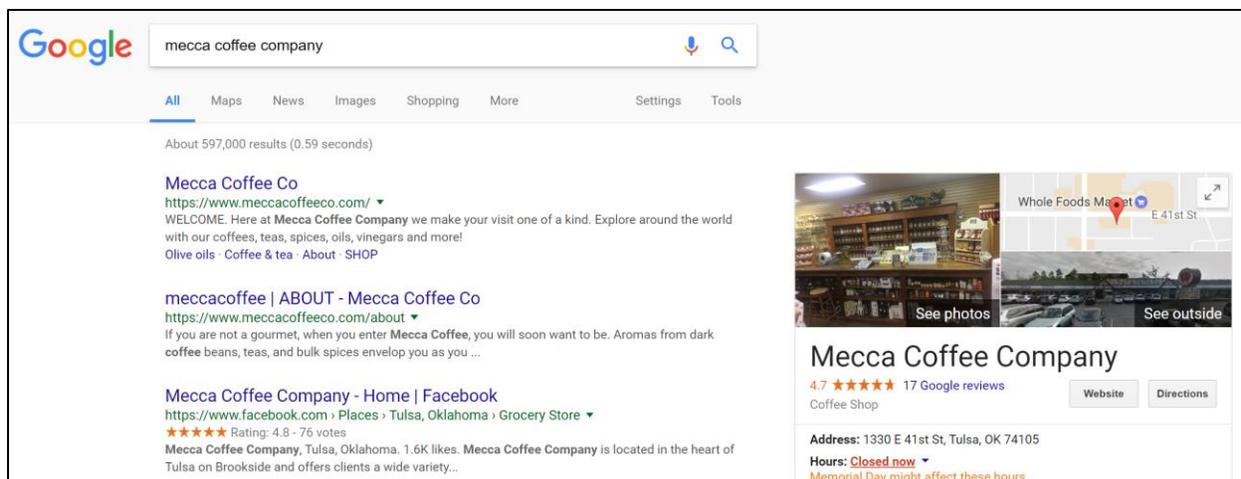
*Reputation management*, in short, is monitoring and protecting your online **branded** and **reputational** searches. To be frank, it is also about attempting to upgrade positive reviews and positive brand mentions so that your online brand image shines.

To understand the search patterns, you can use the example of my company, The JM Internet Group. For example –

a “branded” search is: “JM Internet Group”

a “reputational” search is “JM Internet Group Reviews”

Review sites such as Yelp, CitySearch, Google, etc., as well as ones specific to your industry can have an extremely positive – or extremely negative – impact on your online reputation. Indeed, branded searches on Google (searches for your company name, or your company name plus ‘reviews’) often return Google profiles and reviews directly on the right side of the page. For example, here’s a screenshot for the search “Mecca Coffee Company” on Google:



You can try the search at <http://jmlinks.com/32n>. Notice the primacy of reviews and the highlighted Google listing information plus review count on the far right. Someone interested in going to the Mecca Coffee Company in Tulsa is likely to search for this, or for “Mecca Coffee Company Reviews.” This is even more true for high value searches like probate attorneys, roofing companies, or kitchen remodeling contractors.

## GOOGLE YOUR COMPANY NAME PLUS REVIEWS AND MONITOR YOUR ONLINE REPUTATION

In addition to identifying, claiming, and optimizing your business listings on relevant review sites, you should also monitor your business on these sites. Usually the act of claiming your listing in and of itself will generate an email any time someone reviews your company. Paid services such as ReviewPush (<https://www.reviewpush.com/>), Free Review Monitoring (<https://freereviewmonitoring.com/>), and ReviewTrackers (<http://www.reviewtrackers.com/>) are sophisticated alert systems so that you always know whenever a new review is published about your business.

For your fifth **TODO**, at a minimum set up a monthly checkup of your listings on the major review sites you have identified. Note in a spreadsheet how many reviews you have, how many are 5, 4, 3, 2, or 1 stars. If you have budget, consider using a paid monitoring service.

## » MEASURE YOUR RESULTS

Reviews impact your business in two important ways:

- as a positive (or negative) “trust indicator” that you are a trustworthy business partner; and
- as a signal to search engines and review sites that you should rank high on searches for relevant keywords.

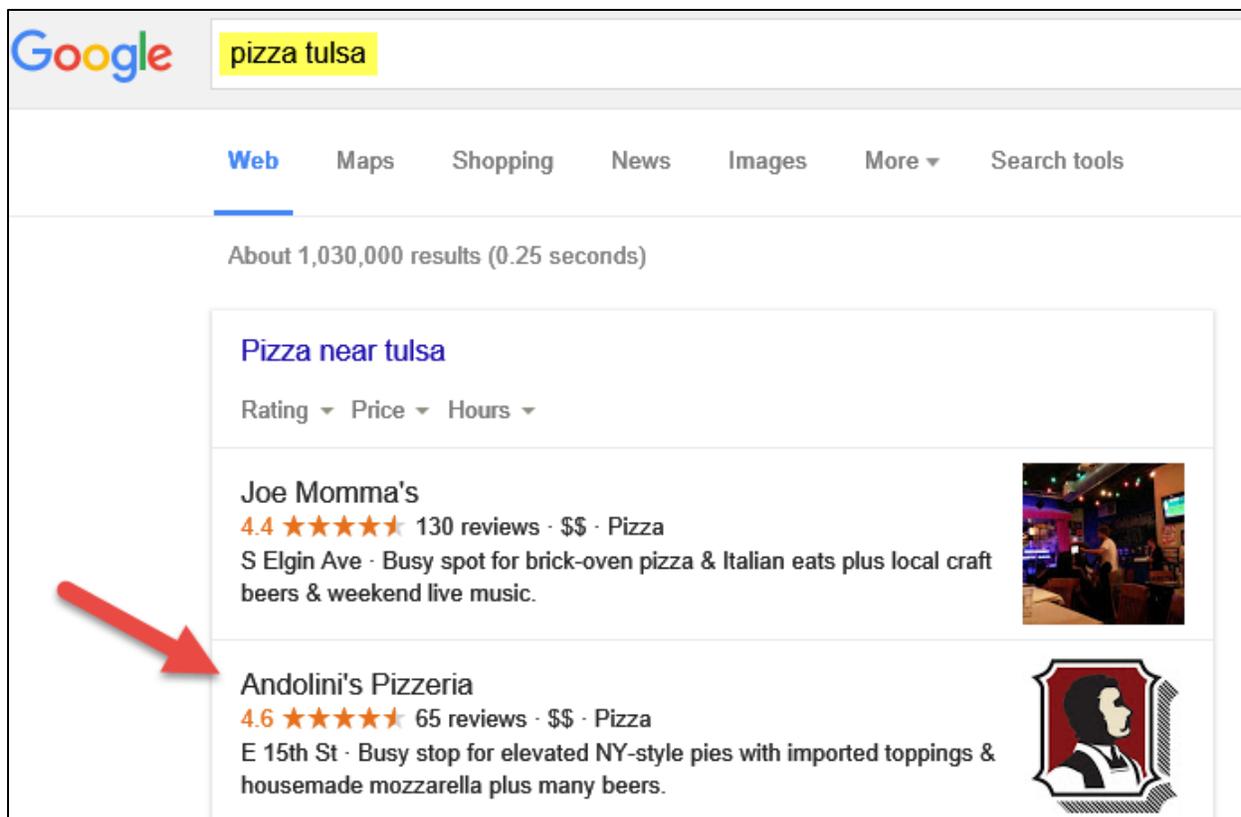
Reviews, in short, communicate that you are a “smart choice” and they propel you to the “top of search” whether that search is on Google, on Yelp, on TripAdvisor or on any other relevant review site.

## MONITOR YOUR REVIEWS

Measurement of reviews, therefore, is focused on these two variables. On your keyword worksheet, I recommend that you create a tab called “local.” Then every month, create a line item (for example, December, 2017), and note down for your business:

The review site, number of reviews you have, and cumulative star rating.

Secondly, try searches for your strategic keywords on Yelp, Google and/or on other relevant review sites (e.g., Airbnb, TripAdvisor, etc.), create a line item for each month, and indicate your position on those searches. For example, Andolino’s Pizzeria was measured as No. 2 for the Google Search “pizza Tulsa” as seen in this screenshot on September 12, 2015.



On Yelp, Andolini's is listed as No. 1. In other words, the restaurant is in good shape on both review sites. If it had dipped to a lower position on Yelp, for instance, then a Todo would be to encourage more Yelp reviews.

The two major aspects of monitoring your reviews, therefore are 1) your review count on each review site, and 2) your position on keyword searches on those sites. To the extent possible, you can then accelerate your efforts for a lagging site and relax a bit for a site for which you rank well and have positive reviews. (Note to monitor your rank, you can use the Fat Rank plugin for Chrome to monitor your rank on Google searches at <http://jmlinks.com/25w> or graduate to a paid rank measurement service such as AHREFS.com, MOZ.com, or SERPS.com. A good free tool to vary your location on Google search can be found at <http://jmlinks.com/26z>.

## »» CHECKLIST: REVIEW ACTION ITEMS

Test your knowledge of the Review Revolution! Take the *Review marketing quiz* at <http://jmlinks.com/qzrv>. Next, here are your review **Action Items**:

- ❑ **Research** whether your customers (and competitors) utilize reviews. Which sites seem to matter for reviews, and why?
  - ❑ Identify a few **customer profiles** that match your *buyer personas*, and determine how active they are as reviewers.
  - ❑ Identify **companies** or **products** to “reverse engineer” who is doing a good job on various review sites both in terms of their search rank and their review volume and aggregate star ratings.
- ❑ Set up or claim **business listings** (e.g., claim your Google My Business account, Yelp account, AirBnB listings, etc.). Be sure to write down the passwords and keep them safe!
- ❑ **Optimize** your **business listings** by writing keyword-heavy copy into the business or product description, and uploading relevant photos.
- ❑ **Optimize** your **NAP consistency** by having a consistent name, address, and phone on your website and on all relevant listing sites. Consider using a service like Moz Local, Yext, or Whitespark to claim and optimize your secondary listings.
- ❑ Create a **review solicitation strategy** that you are comfortable with. This may be as simple as simply requiring employees to “ask” for a review after each job, or as complex as a pre-survey that has a review follow up.
  - ❑ Pay attention to your company’s branded searches on Google and whether review sites are showing up as part of a **reputation management** strategy.
  - ❑ **Respond to negative reviews**, but be polite and take the high ground.
- ❑ Measure your **KPIs** (Key Performance Indicators) such as total reviews and aggregate star ratings each month.

Check out the **free tools!** Go to my *Social Media Marketing Dashboard > Local SEO / SMM* for my favorite free tools on local and review marketing. Just visit <http://jmlinks.com/smmdash>.

### »»» **DELIVERABLE: A YELP / LOCAL MARKETING PLAN**

Now that we’ve come to the end of our chapter on local reviews, your **DELIVERABLE** has arrived. For your final **TODO**, download the **Yelp / Local Marketing Plan**

**Worksheet.** For the worksheet, go to <http://jmlinks.com/workbooks> (click on *Social Media Workbook 2018*, enter the code '**2018social**' to register if you have not already done so), and click on the link to the “Yelp / Local Review Marketing Worksheet.” By filling out this plan, you and your team will establish a vision of what you want to achieve via local reviews.





**YOUR SAMPLE TEXT**  
YOUR SAMPLE TEXT YOUR SAMPLE TEXT YOUR SAMPLE TEXT

# 10

## EPILOGUE

There's always something new! That's what makes social media fun, isn't it? Come on, admit it: you can't wait for the next new thing. (*Just kidding, you probably can wait but it won't wait for you*). I guarantee there will be a next new thing, and I guarantee that they will hype it in such a way that you just “gotta” be doing it.

As we end our journey through the world of social media marketing, I want to point out some of the newer media (ones which do not yet have substantial traction for small businesses), and give you a conceptual framework to think about and evaluate them.

Finally, I want to motivate you to “just do it” and “never stop learning.”

### Let's get started!

#### TODO LIST:

- » New Kids on the Block
- » Just Do It
- » Never Stop Learning
- »» Deliverable: a Social Media Marketing Plan
- » A Final Favor

#### » NEW KIDS ON THE BLOCK

There seems to always be a “new” new thing in Social Media. At the time of this writing, I'd award the “new kid on the block” award to Snapchat (<https://www.snapchat.com/>). Another important “new kid” is Instagram

(<https://instagram.com/>), which while not as new as snapchat, is just beginning to come into its own as a social media *marketing* venue. And still yet another one to watch is Medium (<https://medium.com/>), which seems to be the up and coming place for long form content. For most small to medium businesses, I do not yet see either of these as full of opportunities, but if you do – then by all means, use them!

Here are my recommendations:

- **Keep your eye out for** new social media platforms that might be relevant to your business like Snapchat, Instagram, or Medium.
- **Sign up for a user account**, and find the business help files or “how to advertise” information. Begin your research.
- **Research** whether your potential customers are “on” this social media and – if so – figure out what they are doing.
- Keep an eye out for **competitors** or **big brands**. **Reverse engineer** what they are doing in terms of marketing, and translate their actions into doable items for your own company.
- **Brainstorm** how you and your company can participate in an authentic way and yet still have a marketing objective. Is it possible to use Snapchat or Instagram to interact with potential customers? How or how not?
- Start slowly, **learn by doing**, and don’t be too heavy-handed.

In most cases, you’ll see many similarities between the “new” social media like Snapchat or Instagram and the “old” social media like Facebook or Twitter. Snapchat, for example, is beginning to overtake Twitter as a place for real-time or instantaneous communication, as well as a way for brands to offer exclusive information, coupons, or deals to their most avid fans. The fact that a “snap” disappears over time, isn’t really that different from a tweet. Instagram, in turn, isn’t that different from photo-sharing on Facebook (it’s really just the photo element of Facebook), plus some similarities to Twitter. Remember Flickr? It was really just Instagram before it’s time.

Indeed, once you see how Snapchat and Instagram are “going after” Twitter, it makes a lot of sense why Twitter has earned the dubious title of the “troubled” social media. I have to also commentate that, sadly, it looks like Facebook (which owns Instagram) has largely succeeded in stealing Snapchat’s thunder by shamelessly copying innovations like stories. So watch out for these competitive battles with an eye to who wins, and who loses. Google+, for example, is clearly dead.

But beyond Google+, Snapchat, and Instagram, you may find social media like Tumblr (<https://www.tumblr.com/>) or even ones overseas. (China, in particular, has its own unique set of social media platforms). New ones will no doubt pop up, but the structural

realities of social media make them all the members of the same genus if not the same species.

Along the way, keep your eye on the established social media platforms like Facebook, LinkedIn, Twitter, and YouTube as they are also innovating and adding new features. Facebook's move to video, for example, has opened up new marketing possibilities for "native" video on the platform. Facebook live and YouTube live are other examples of new opportunities "within" a platform as opposed to on a totally new platform. I am also very excited about LinkedIn *Pulse* as a blogging platform for B2B. As an information strategy, identify the official blogs for the media most relevant to your company and follow them. I use Feedly (<https://feedly.com/>) as an easy aggregator for official and unofficial blogs that cover social media.

## » JUST DO IT

Voltaire said, "The perfect is the enemy of the good," and today's Nike corporation said, "Just do it!" In both cases, the thought is to "learn by doing" and to just "get started."

- Don't be intimidated!
- Do some research, make a plan, and get started!
- Just do it!

Many companies get stuck in "analysis paralysis," always researching and never doing. Don't be one of them! Others get stuck in "doing with no strategy," as in tweeting 24/7 when none of their customers are on Twitter.

Do it! But keep your eyes and ears open to strategy, tactics, and results. If it isn't working, try something else. Don't be afraid to try, and fail.

Everyone – including myself- is just learning how to "do" social media marketing. Don't be intimidated. There are no real experts. Just fools like me who pretend to know what we're doing.

So just do it, please. *(And email me your ideas, thoughts, suggestions, and questions. I learn more from my students than from anyone else).*

## » NEVER STOP LEARNING

If you haven't already, download my *Social Media Toolbox*, and turn to the chapter on publications and conferences. Read the social media blogs (I'm partial to the Social Media Examiner (<http://www.socialmediaexaminer.com/>)) and their yearly trade show in San Diego.

Never stop learning!

## »» DELIVERABLE: OUTLINE A SOCIAL MEDIA MARKETING PLAN

Now that we've come to the end of the book, go back to the "Party On" chapter. If you haven't already completed it, your **DELIVERABLE** has arrived. For the worksheet, go to <https://www.jm-seo.org/workbooks> (click on *Social Media Marketing Workbook 2018*, enter the code '2018social' to register if you have not already done so), and click on the link to the "Social Media Marketing Plan Big Picture Worksheet." By filling out this plan, you and your team will establish a vision of what to do at the top level, and then by filling out the plans and worksheets for individual media like Twitter, Facebook, or Instagram, you'll know what to do for each individual medium. So get started, and in the immortal words of Garth Algar of the movie *Wayne's World*, "Party On!"

## » A FINAL FAVOR

If you've read this far, well, I'm impressed. I feel like at this point I should give you the ultimate secret to social media and life in general. I think it's some combination of "never stop learning," "be humble," and most of all "be kind to other people." We're all God's children and if we could just learn to see that in everyone we meet... well, the Earth would be a lot nicer. But I digress.

I hope you've enjoyed this journey with me, and if the Spirit moves you, I would really appreciate a short, honest review of the *Social Media Marketing Workbook* on Amazon. Simply fire up your browser, go to Amazon.com, and search for the book. (You can also click on <http://jmlinks.com/smm>). Click on "customer reviews" and then on "Write a customer review."

Thanks in advance.