SOCIAL MEDIA

MARKETING WORKBOOK

2026

JASON MCDONALD

SOCIAL MEDIA MARKETING WORKBOOK

2026

Jason McDonald, Ph.D.
© 2026, JM Internet Group

https://www.jm-seo.org/
Tel. 800-298-4065

"The true genius of social media marketing is serving the martini that makes the mocktail necessary, and the mocktail that makes the martini inevitable at the party no one knew was popular until everyone showed up fashionably late but actually right on time."

– Dr. Horatio Vexler, Director of the Center for Strategic Wantology,

Newtopia University

For R.C.

TABLE OF CONTENTS

PREFACE 5
1 MARKETING BASICS 17
2 PARTY ON - SOCIAL MEDIA MARKETING 31
3 CONTENT MARKETING 57
4 FACEBOOK (ORGANIC) 93
5 FACEBOOK (ADs) 153
6 LINKEDIN 185
7 X (Twitter) 257
8 INSTAGRAM 311
9 YOUTUBE 379
10 TIKTOK 435
11 PINTEREST 469
12 EMAIL MARKETING 497
13 EPILOGUE 507

https:
search

PREFACE

The epigraph that begins this book, a quote by world-famous marketer Dr. Horatio Vexler, explains that social media marketing is like throwing a fantastic party. It's serving the right drink to the right guest at the right time. Reread the immortal words of Dr. Vexler:

> "The true genius of social media marketing is serving the martini that makes the mocktail necessary, and the mocktail that makes the martini inevitable at the party no one knew was popular until everyone showed up fashionably late but actually right on time."

What Dr. Vexler means, and what this Workbook seeks to teach you, is that social media – all social media, from Facebook to LinkedIn, Instagram to TikTok, YouTube to X – is a *party*. And you, dear reader, are the *party organizer*.

My name is Jason McDonald, and I want to welcome you to my 2026 *Social Media Marketing Workbook*. Throughout this workbook, I will guide you through the various social media platforms – from Facebook to X, YouTube to TikTok, Instagram to Pinterest, LinkedIn to Blogging, and beyond. Along the way, I will give you a **framework** to understand social media marketing – that it's a **party**, and you are the **party organizer**. I will provide **structural tips** to set up your brand on each platform. I will return again and again to the theme of "**content marketing**" – your own content, curated content, UGC (User-Generated Content), and interactive content. I will give you **tips**. I will show you free **tools**. I will point to when and how to use **advertising** as a complement to **organic** efforts. I will guide you **step-by-step** on the basics of setup and posting on each platform.

Throughout the Workbook, I'll emphasize the twin concepts of a) a "**classic**" social media platform like Facebook or LinkedIn, in which users tend to be shown content posted by "friends," "connections," or "brands" they follow, and b) the newer "**recommendation engine**" concept on platforms like TikTok, Instagram Reels, or YouTube Shorts, in which users are fed content that matches their "interests," whether or not they are connected to that person or brand. Yet another theme is **advertising**. Many marketers detest advertising, and I understand that. However, I will teach you to

be "smart" about advertising and to blend your organic social media marketing efforts with your paid advertising efforts.

Throughout this new, updated 2026 edition, I will discuss AI or "**Artificial Intelligence**." AI is a revolutionary force impacting not just how content is disseminated (the infamous "algorithms" of social platforms), but also how it is brainstormed, created, edited, and evaluated for effectiveness. I strongly recommend that you get the paid version of ChatGPT, called "ChatGPT Plus" at **https://chatgpt.com/pricing/**. Throughout the Workbook, look for "**AI Prompts**" that you can copy/paste into ChatGPT so that AI can improve your marketing. You can use alternatives such as Google Gemini, Microsoft Copilot, or Perplexity, but my belief is that ChatGPT remains the leader and best.

I think of AI as my "helpful High School intern." I brainstorm tasks and ideas, and work with AI in a conversational format. I don't just unthinkingly follow AI; I verify the information it gives me. Throughout this Workbook, therefore, I encourage you to utilize AI extensively (if you are not already doing so). I **strongly recommend** you make a career goal of being "AI aware!"

Indeed, you'll realize (if you haven't already) that Dr. Horatio Vexler isn't a real person. He doesn't teach at a real university. He and his quotes are entirely fabricated, and I'm not sure (and neither is he) which part of him was created by me and which part was generated by AI. By the end of this Workbook, however, you won't care. You'll reach a higher plane of marketing mayhem. You'll know the basics and the secrets of social media, and you'll realize that asking whether Dr. Vexler is "real" is the wrong question. The "right questions" are how to use social media to promote your business, and how AI can help you get your job done quicker and better.

You'll also grasp one of my key tips: "**If you know the question, you can 'Google,' 'YouTube,' or 'ChatGPT' the answer.**" No one can know everything there is to know about social media marketing! What's more important is to know *how to formulate a key question*, such as "How do you set up check-ins on a Facebook Page?" or "How can you 'go live' on multiple platforms?" and then to *Google/YouTube/ChatGPT* and find the answer. In short, if you follow the teachings of this Workbook, you'll know what to do and how to do it.

Why Market via Social Media?

Why expend your marketing blood, sweat, tears, and budget on social media? Here are some key reasons:

- **Your customers are on the platforms.** Nearly everyone uses Facebook – from teenagers to grandmas, business executives to flight attendants. Every day, nearly five billion videos are watched on YouTube, and nearly everyone is on one of the social platforms, whether that is Facebook or Instagram, TikTok or YouTube, LinkedIn or X. By marketing via social media, you can "fish where the fish are."

- **Social media is big.** Facebook, the largest platform, has over three billion users worldwide and climbing; LinkedIn sports over one billion members as "the" network for B2B. Indeed, new platforms continue to emerge – not just TikTok, but also the rebirth of Reddit, the creation of BlueSky and Threads, the rise of Nextdoor, and one never knows if Tumblr might make a comeback. Every day, over one billion hours of video are watched on YouTube, and so on and so forth.

- **Social media is free**. Facebook, YouTube, TikTok, Instagram, and Pinterest are, of course, *free* to use. Users love them because, "for free," they get access to their friends and family, plus content from content creators and brands they love. 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 – more on that later!*)

- **Social Media builds your brand.** Social media is a key part of staying top of mind: engaging content on Facebook, Instagram, TikTok, etc., can "build your brand" so that you will "sell more stuff." Throughout this book, I'll point to successful brands like REI, Wendy's, Chipotle, and Rustic Cuff that use social media to nurture a "tribe" of customers, fans, and superfans, turning them into brand ambassadors.

- **Social Media can spread your message to new customers.** Unlike on search engines like Google (where customers must proactively look for you), social media means that your company, product, or service can be "discovered" and "recommended" as customer "No. 1" shares information with customer "No 2." Even better, the algorithm itself can spread your message (for free). Not everything "goes viral," of course, but social media can leverage your "customer tribe" and the "AI recommendation algorithms" to spread your brand message far and wide.

- **"Recommendation Engines" Create Opportunities for Content Marketing.** Led by TikTok, platforms as diverse as YouTube and Instagram are increasingly relying on "artificial intelligence" and suggesting content to users. *Dog lovers see more dog videos. Cat lovers see more cat videos.* This occurs even if they do not "like" or "follow" the publishers of this content. This is a huge opportunity

for you to reach "new" customers: just create fun, viral, shareable, snackable content (especially video) that matches their interests.

- **Advertise where your customers are.** Facebook, Instagram, X, YouTube, LinkedIn, Pinterest, TikTok – indeed, every major social media platform offers targeted advertising that - when done right - can be an effective way to build your brand and sell more stuff. Savvy marketers recognize that this is a "both/and" issue, not an "either/or" issue; they embrace both organic opportunities and paid advertising.
- **Embrace AI (Artificial Intelligence).** AI is already a key part of social media algorithms. AI feeds consumers content that they like and keeps them engaged on each platform (especially, but not only on video platforms like Instagram Reels, YouTube and TikTok). AI is also a key part of "content generation." Throughout this book, therefore, I will explain how ChatGPT (**https://chat.openai.com/**) and/or Google Gemini (**https://gemini.google.com/**) can help you be a better marketer.

Who is This Workbook For?

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. If your job is to market a business or non-profit in today's Internet economy, this Workbook 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, X to Yelp, Pinterest to YouTube to TikTok, and beyond) will benefit from diving into the pages that follow.

And even if you are a skilled practitioner, this book will add value by helping you think strategically about how to market via social media. As we go platform by platform, we will review tips, tricks, and secrets that you might not know about.

If you're a student or perhaps an *un-* or *under*-employed marketer, and you're building job skills, this Workbook will help you join the digital revolution by "going social." This Workbook teaches you the cornerstone skill of how to market on social media. Check out my other digital marketing books at **https://jmlinks.com/books** to learn more about SEO, Google Ads, and digital marketing.

How Does This Workbook Work?

You can't use social media effectively without a basic understanding of marketing. Accordingly, **Chapter One** is a basic marketing primer. Think of it as a

Stanford business school course on marketing in about an hour; the absolute key concepts one needs to grasp as to what marketing is and how to do it.

Second, we dive into social media marketing at a conceptual level. 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 this distinction between "attending" the social media party and "throwing" the social media party is the subject of **Chapter Two.**

SOCIAL MEDIA MARKETING = THROWING GREAT "VIRTUAL PARTIES"

Chapter Three is the third key 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. Chapter Three will explain to you how to set up and maintain a content production machine to feed all your social channels.

Chapters Four through **Thirteen** provide in-depth examinations of the major social media platforms. We'll start with **Facebook**. First, I'll give an overview of how Facebook works, explaining everything from profiles to pages, likes to comments, shares, algorithmic preferences, and posting rhythms. How to market and advertise on Facebook will become clearer as you and I work through Facebook in plain English, written for "mere mortals." Along the way, I'll provide **videos** and **worksheets** that act as "Jason as therapist." Chapter **quizzes** help you test your knowledge. My goal is for you to not only *understand* social media marketing but also to begin to *do* marketing on Facebook. Ditto for LinkedIn, X, Instagram, TikTok, YouTube, and the rest of the gang.

BONUS CHAPTER: DIGITAL MARKETING AND AI

A new **bonus Chapter** for 2026 (available via *download* only after you register your book as explained below) explores digital marketing and Artificial Intelligence. What is AI? How should you approach it as a marketer? This workbook is "AI aware," constantly referencing tools and tips to utilize AI in your marketing work. Be sure to register your workbook and download the free AI Chapter! AI is the future of digital marketing, and I strongly encourage you to pay attention.

Table of Contents

1. **Marketing Basics** – a primer on how marketing is "building your brand" to "sell more stuff."
2. **Party On – Social Media Marketing** – an overview of social media marketing at a conceptual level.
3. **Content Marketing** – how to conceptualize the type of content you need for your social media marketing efforts and build a content production machine.
4. **Facebook Organic**– how to market your business on Facebook for free.
5. **Facebook Advertising** – how to advertise on Facebook (and Instagram), the two largest platforms for paid advertising on social.
6. **LinkedIn** – how to use the world's largest B2B network for your business, including advertising opportunities.
7. **X (Twitter)** – an explanation of whether you should post and, if you do, how to use "X" effectively for business marketing.
8. **Instagram** – how Instagram is like X with pictures, how to market on Instagram.
9. **YouTube** – a deep dive into the business side of YouTube, often hidden behind cat videos and viral gyrations from Adele or Fuerza Regida. Included is a discussion of how to leverage YouTube advertising opportunities for your video strategy.
10. **TikTok** – tips, tricks, secrets, and ideas for the newest platform that's created a niche for viral videos, dance moves, duets, and even music as hashtags. The TikTok revolution is one via its "Recommendation Engine" technology. As we shall see, TikTok has implications that extend beyond teenage girls.
11. **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.
12. **Email Marketing**. Email marketing is the "Rodney Dangerfield" of social media marketing. It don't get no respect. However, it should, and this Chapter explains why you should use email as part of your social media marketing strategy.
13. **Epilogue** – how to "never stop learning" and recognize opportunities, trends, and tips in the 24/7 nonstop world of social media.
14. **AI (Artificial Intelligence)** – a bonus, downloadable Chapter on AI and marketing. Not just how AI is changing Google, Facebook, TikTok, or how AI

tools and strategies make marketing easier. This Chapter helps you make a strategy to be "AI aware" and "AI friendly" as the AI revolution disrupts marketing at every level. (*See how to register your workbook, below*).

» Meet the Author

My name is Jason McDonald, and I have been active on the Internet since 1994. I have taught SEO, Google Ads, and Social Media Marketing 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 training sessions across the 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 on X or LinkedIn at *@jasoneg3*, on the Web at either **https://www.jasonmcdonald.org/,** or at **https://www.jm-seo.org/**. I also teach SEO and Social Media Marketing for Stanford Continuing Studies via their online programs. To learn more, visit **https://jmlinks.com/classes**. The classes build on the books and focus on practical, hands-on knowledge of SEO and Social Media Marketing successes.

» Spread the Word: Take a Survey & Get $5!

If you enjoyed this workbook, please take a moment to complete a brief **survey**. The survey helps me find errors in the book, learn from student questions, and get feedback to improve future editions. Plus, by taking the survey, I'll be able to offer you a free pony (supplies are limited). OK, no pony, but I'll learn what you want and hopefully give you more in future Workbook editions.

Here's how –

- Visit **https://jmlinks.com/survey**.
- Take a short **survey** about the book.
- I will rebate you $5.00 via Amazon gift eCard.

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

» Questions and More Information

I encourage my students to ask questions! If you have questions, submit them via **https://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 the most from my students. So please ask questions!

» Register Your Book

Finally, this workbook leverages the power of the Internet. Register your Workbook to access a cornucopia of **free** resources, including the "Bonus Chapter" on "AI and Marketing:"

- Go to **https://jmlinks.com/smm2026ocsn/**
- Reenter this password: **smm2026ocsn** at the welcome screen.
- Follow the instructions to enter your email.

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 investigate various resources, such as example websites or social media pages, FAQs, support or help from major vendors, and videos.
- **Worksheets**. Throughout the book, I reference "worksheets." These PDFs help you formulate a master social media marketing plan and specific plans for each platform.
- **Jason's Dashboard** – an easy-to-use, clickable list of the best tools for social media marketing by category (e.g., Facebook tools, X tools, etc.).
- ***The Marketing Almanac*** – a collection of up-to-date social media tools in detail. While the *Dashboard* identifies my favorites, the *Almanac* compiles the universe of free social media tools as well as free tools for SEO and Google Ads.

- **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.
- **NEW! AI and Digital Marketing** – a new, free downloadable Chapter on AI plus a massive list of AI tools for marketers. **YOU MUST REGISTER TO GET THIS CHAPTER** – so please do!

Jump Codes

Throughout the book, I reference the website **https://jmlinks.com/** via various "jump codes." If you're reading in PDF format, the links are clickable. If you're reading this workbook in hard copy or on the Kindle, I advise you to fire up your Web browser, bookmark **https://jmlinks.com/,** and enter the codes of resources to check out.

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

» A Word on Errors, Typos, and Videos

This book is full of errors and typos. So is my life. Let me explain. There are two choices. You can make a fully proofed, typo- and error-free "perfect" book that is outdated as soon as it is (finally) published. Alternatively, you can author an up-to-date self-published book that provides current information from a seasoned professional in the trenches of social media marketing. This workbook is NOT perfect. It has typos. It has errors. It isn't peer-reviewed. It has awkward sentences. Nope, sorry it's not perfect. But in my opinion, it is a useful book. It's up-to-date. It has practical tips and tricks. It has a cornucopia of resources. However, if you find a typo or error, please email me via **https://jmlinks.com/contact**. I will send you a free copy of one of my books in gratitude plus a free puppy. OK, no puppy, but I will thank you for finding a pesky error!

» 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.*

Copyright © 2026, JM Internet Group and Excerpti Communications, Inc., All Rights Reserved. No reproduction or citation without written consent of the publisher. For details and to contact us, visit our website at **https://www.jm-seo.org/**.

This is a completely **unofficial** workbook to social media marketing. No one at Facebook, LinkedIn, X, YouTube, Instagram, TikTok, Pinterest, Yelp, Google, Instagram, Snapchat, the White House, or any other social media company has endorsed this workbook, nor has anyone affiliated with any of those companies been involved in the production of this workbook.

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

In addition, please note the following:

- All trademarks are the property of their respective owners. I have no relationship with nor endorsement from the mark holders. Any use of their marks is solely for the purpose of providing information to you. Don't confuse them with me or me with them. I'm just a poor intellectual, and they are big, rich, powerful corporations with teams of money-grubbing lawyers.
- Any reference to or citation of third-party products or services, whether for Facebook, LinkedIn, X, Yelp, Google, TikTok, Yahoo, Bing, Pinterest, YouTube, Instagram, Snapchat, or other businesses, search engines, or social media platforms, should not be construed as an endorsement of those products or services tools, nor as a warranty as to their effectiveness or compliance with the terms of service with any search engine or social media platform.

The information used in this workbook was derived at the time of publication. However, social media marketing is a rapidly evolving field, 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 online advertising, 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.

» ACKNOWLEDGEMENTS

Gloria McNabb has done her usual tireless job as first assistant, including updating this edition as well as *The Marketing Almanac*. Sierra McNabb tirelessly updated the free tools and links. Sierra is a member of the up-and-coming generation of new marketers, and I'm excited to mentor her on her journey. I want to thank my two daughters, Hannah

and Ava. Hannah is my go-to girl for quantitative number crunching. Ava is my Gen-Z young adult in the trenches of today's "social media generation," who has found the patience to explain TikTok to me at least three times while constantly reminding me, "Dad, Facebook is not cool." My girlfriend, Robyn Cowley, however, encouraged me to remember that "Facebook remains relevant (at least for us older consumers)" "and even the older set can groove out on TikTok." Robyn is also the relationship videographer-in-chief, memorializing every trip and major romantic encounter with at least one video montage. I look over her shoulder and remind myself that "fun" is what social media is all about, especially if you are in love (which I am).

I would also like to thank my black Labrador retriever, Buddy, and rescue dog, Zero, for countless walks and games of "hoops," quizzical looks when I talked out loud to these beloved animals about the vagaries of AI or TikTok, as well as I refined my ideas about marketing and about life. A huge "thank you" goes out to my students – online, in San Francisco, and at Stanford Continuing Studies. You challenge me, you inspire me, and you motivate me!

1
MARKETING BASICS

Long before social media existed, and long before social media *marketing*, there was simply *marketing*. Marketing, as I explain in this Chapter, is the art and science of "building your brand" to "sell more stuff." If you're a marketing expert, you can skip this Chapter. If you're not, you'll find it a useful primer on how to think about "building your brand" to "sell more stuff." Even if you are a seasoned marketing expert, I highly recommend that you create a formal "marketing plan" as to the what, where, how, when, and why of your efforts to build your brand to (ultimately) sell more stuff.

Let's get started!

TO-DO LIST:

- » Grasp a Basic Definition of Marketing
- » Build Your Brand
- » Identify Your Buyer Personas
- » Write Your Business Value Proposition
- » Investigate the Five Discovery Paths
- » Know Your Customers' Journey
- » Measure What's Measurable
- »» Checklist: Marketing Basics Action Items
- »» Deliverable: a Short and Sweet Marketing Plan

» Grasp a Basic Definition of Marketing

Here's a short, simple definition of "marketing:"

> "Marketing" is the art, science, and hard work of *building a brand* to (ultimately) *sell more stuff*.

All the tips, tricks, secrets, and concepts in this Book – from Facebook to YouTube, TikTok to LinkedIn, Instagram to Pinterest, creating a blog post to uploading a short video to Instagram reels to an hour-long free course on YouTube – should be oriented towards either a) building (your) brand, and/or b) selling more stuff (whether that "stuff" is a product or service). Even if you are a nonprofit, you must build your brand to attract more donors, volunteers, and clients.

With this pithy definition of marketing in hand, we can unpack what marketing entails, starting with "brands" and "branding," and concluding with the KPIs (Key Performance Indicators) of our marketing efforts.

» Build Your Brand

The word *"brand" comes from an Old English word meaning* "burning." Even today, we describe the rather barbaric process by which cattle become "marked" by hot iron as "branding," and the "logo," as it were, that appears on each cow as a "brand." A brand was originally marked to denote ownership, but over time, branding has come to mean the "warm and fuzzy" feeling a consumer associates with a particular company and its products or services. Cattle from Rancher "A," for example, are supposed to taste better than cattle from Rancher "B," just like a Cabernet wine from Vineyard "A" is supposed to taste better than a Cabernet from Vineyard "B." The brand conveys something you can count on, a prediction you can make about a product or service before you try it or buy it. It's the warm and fuzzy that extends before, during, and after a purchase.

> **VIDEO.** Watch a video by marketing guru Seth Godin on "what is a brand" at **https://jmlinks.com/73g**.

To be more current than cows and cabernets, look at Apple. Notice, for example, that the first thing that popped into your head wasn't the shiny red fruit but the Cupertino-based technology company, i.e., Apple Computers and Apple iPhones. Apple has a brand *identity*. Apple has brand *equity*. Apple has worked hard on branding, the process of projecting a brand identity and building brand equity in the minds of its target customers. Ponder your own opinions about the company called "Apple." Did you do diligent fact-based research on Apple to come to these opinions, or are your "opinions" the result of effective marketing by Apple? Most of us are busy, and we often use "decision shortcuts."

Brands are the personalities of businesses. Brands are the warm and fuzzy feeling you have around a company that pre-positions you as ready to buy their products or services. A brand identity like "Rolex" means stylish, quality watches that say, "You've made it," and you can afford the incredible price. A brand like "Walmart," in contrast, means you're a smart shopper who knows value when she sees it. And a brand like "BMW" means prestigiously sporty cars. **Brand identity**, in the abstract, is that "warm and fuzzy" feeling you have around a company. It pre-sells you. It primes you to think positively, and it makes the sales process easier for the company. That's why companies strive to create and nurture positive brands; they make it easier to sell more products and generate more revenue.

YOUR BRAND IS THE "WARM AND FUZZY"

Notice as well that the brand rubs off on the consumer. Those who drive BMWs are wealthy, stylish, and sporty. The **brand halo** envelops the consumer, as we humans are tribal animals, and we want to get "inside of" brands that conform to our own personal identities. Consumers "fall for" the idea that you are what you drive, you are what brand of cell phone or computer you use, or you are whom you vote for. Tribalism is the psychological footprint of the dance between consumer and brand, and – as we shall see – **nurturing a brand tribe is a key goal of social media marketing**.

If a brand is the *static* result of all the hard work of the marketing department, **branding** is the art of building a brand one marketing step at a time. Let's look at branding step by step. First, you must define your **brand identity**. This is the complex of *skills* and *attributes* that you want to associate with your company. Skills are not the same as attributes; the former refers to the technical things your company can do, and the latter refers to the idiosyncratic aspects of personality. Tesla, for example, has the "skill" of making cars that get you from point "A" to point "B." Teslas will get you where you want to go and do it without polluting (*the skills*), but also wrap a halo around you as an eco-friendly, smart, and stylish consumer (*the attributes*). The Tesla brand is a "helpful expert" that assists you in building your own personal brand, and the Tesla branding project is the effort to persuade you, as a consumer, that this is the best car for the job. (And note that the controversy surrounding Elon Musk and his "personal brand" is having a turbulent impact on Tesla profits.) Brand-building is an on-going concern, and pitfalls abound. Ask Cracker Barrel about how even a seemingly innocent logo change can spur the wrath of consumers who have a different view of what a brand means).

Ponder your own company for a moment from the perspective of branding. What *skills* does your company, product, or service provide? These are the *technical* aspects. What *attributes* characterize your company? These are your brand personality. If, for example,

you are a manufacturer of women's jewelry (that's a "skill"), your branding might build on that "value" or "skill" to be more funky and wild, more elegant and classy, more cheap and whimsical, or more expensive and permanent. Ponder watches. Watch brands range from *"what-time-is-it" (Timex) to "look-how-rich-I-am" (Rolex) to "look-how-hip-I-am"* (Vintage Zodiac). All of them tell time ("skill"), but each of them projects a different emotional brand ("attributes). The "brand" is the *result*, and "branding" is the *process* by which marketers magically and mystically get consumers to believe a car is more than just a car, a watch is more than just a watch, and your piece of jewelry is more than just a stone set in rare metal.

Your **to-do** here is a) define your brand (the "end result" you want in your target buyers' heads), and b) your brand*ing* tasks (the "how" you will work to persuade your target buyers that your brand fits what they want or need).

> **AI PROMPT.** Feed ChatGPT content from your website (homepage or company description, as well as key product or service pages) by copy/pasting it into the AI tool. Then, ask it, "Hey, I've given you a sample of content from our website. Please summarize our 'brand' in 200 words as if you were one of our target customers. Be specific. What does our brand represent to the customer? What 'warm and fuzzy' feelings does that customer perceive about our brand?"

Brands are in a dance with consumers, after all. A brand like Apple or Ford can't just force its ideas down consumers' throats; rather, with the skill of complex marketing, they promote, persuade, tickle, cajole, pester, reiterate, elaborate, entice, entertain, convince, and argue their way into consumers' heads. Branding is a task of persuasion.

At a practical level, your businesses must satisfy a need or desire that consumers have, a "pain point" or a "pleasure goal." Even highly technical, business-to-business (B2B) companies like Intel, HP, or Thermo Fisher Scientific build brands that resonate with their customers, addressing shared fears and nurturing shared pleasures, to create brand tribes of like-minded customers who have passionately bought into the brand identity.

» Identify Your Buyer Personas

With the dance between brands and consumers in mind, let's step back and examine the problem from the customer's perspective. One of the newer words to enter the marketing lexicon is "buyer personas," "customer personas," or "customer segments." The term you use isn't as important as the concept, namely, to look at your company, product, or service from the "outside in" from the perspective of potential customers.

Who are your customers? What do they want? And how do they clump into definable groups? How can organizing your customers into definable personas help you to better tune your branding to their hopes, needs, dreams, and fears?

One fundamental way to think about customer segments is to group your customers by attributes or dimensions that are "permanent" or "very hard to change" vs. attributes or dimensions that are "not-so-permanent" or "easy to change."

For example, *demographics* goes into the first type. Older people do not become young again, rich people generally do not become poor, and individuals who live in Texas don't generally become those who live in California. These hard-to-change dimensions provide some predictive power regarding customer wants, pain points, or behaviors. If your company is selling prenatal photography, for example, the primary customer will be pregnant women. If you are selling University of Oklahoma sports paraphernalia, you can reasonably expect that people in Texas won't want it and won't buy it. Income is another relatively stable attribute. Rich people are significantly more likely to purchase luxury cars than their poorer counterparts, and the latter spend a higher proportion of their income on Uber, Lyft, and bus tickets.

If *demographics* speaks to hard-to-change attributes of your customer segmentation, then *psychographics* speaks to easier-to-change attributes. People who "lean left" tend to like organic food more than people who "lean right," for example. (Why, I'm not sure, but it does seem to be true). But that attribute is more "in their head" than something in the physical reality around them, like what sex they are or whether they are rich or poor. People can be persuaded to try organic food, even if they are "lean right" or "are poor," and diet fads, from weight loss programs to "avocado is good for you" to "gluten is bad for you," speak more to the psychology of customers than to their demographics (though not entirely). Psychographics, in short, describes psychological elements and lifestyles – aspects that are more fluid than demographics.

DEMOGRAPHICS, PSYCHOGRAPHICS, & SITUATIONALS

Another element to figuring out your customer personas is *situational*. People who are in their 20's, for example, tend to be out on the dating scene, consuming movies and restaurant meals more than people in their 50s. The "situation" is as critical as the "age." Think "people who are single" vs. "people who are married." Or a situational is "people who are in Palo Alto and are hungry," or "people in the market for a new car" or "people who have just bought movie tickets," and you can predict that they might be good targets for popcorn. People who are leaving town and need a place to stash the

cat are "situationally" primed to purchase from the hypothetical business, Jason's Cat Boarding Emporium, which I use in my book on Google Ads.

You can easily see that the line between demographics, or "hard-to-change," and psychographics or "easy-to-change," is blurrier than you might think at first glance. However, psychographic or situational attributes, such as Republican vs. Democrat, open-to-change vs. tradition-minded, and just-had-a-baby vs. in-retirement, are important elements to consider as you map out your customer groups.

With these concepts in your head, return to the notion of **buyer personas**. Think of a customer or buyer persona as if you were role-playing or dressing up for the theater as an actor. It's the total package: demographics, psychographics, and even situational factors. Your buyer personas are those people who are primed to want your product or service, either demographically, psychographically, or situationally.

> **AI PROMPT.** Feed ChatGPT or Gemini a few basic ideas about your business and what it sells. Explain demographic, psychographic, and situational aspects of your customers. Ask it, "With the information I've given you about our business and potential buyer personas, list five different buyer as a bulleted list with a one paragraph explanation for each persona. Be specific about their demographic, psychographic, and situational characteristics."

For example, hungry young men in Palo Alto may be "primed" to want to eat at Chipotle. In contrast, hungry young women may be "primed" to eat at Sweetgreen salads, and hungry vegetarians with two children may be primed to visit Whole Foods and prepare their own meals. Your task here is to consider your buyer personas and outline their key attributes. "Play act" as if you are one of them and look at the world not through the eyes of your business but through the eyes of your customers. In addition to AI tools, check out the free, fun online tool on "buyer personas" from Hubspot at **https://jmlinks.com/29s**.

» Write Your Business Value Proposition

Now that you've pondered brands and branding and considered who your buyer personas are, it's time to bring them all together in a Business Value Proposition, or BVP. Writing a *Business Value Proposition* (BVP), *an Elevator Pitch, or a Unique Selling Proposition (USP), as this concept is sometimes referred to*, is essential to successful marketing. The brass tacks of it are to figure out:

WHAT DO YOU HAVE THAT THEY WANT?

If you make **pizza**, you sell **food** to hungry **folks**. If you run a **Cat Boarding Emporium**, you sell a service to "stash the cat" to people who own a cat and want to leave town. If you make Teslas, you sell good-looking cars that convey a stylish environmental message. It's simple, and it's complicated.

A BVP defines *what you sell that they want*. A BVP is something like "Pepsi sells soft drinks to thirsty young consumers, as the choice of a new generation," or "Tesla sells electric cars to affluent consumers who are both eco-friendly and desirous of sporty, good-looking vehicles."

We will drill down to a more detailed Business Value Proposition in a moment, but for now, notice that the BVP explains "what you sell" "that they want." You don't need to overcomplicate it. The best BVPs are short, sweet, and – more importantly - **specific**. If you find yourself writing empty marketing platitudes like "amazing customer service" or "high-value services," take those out. Make every word matter.

Notice also that a BVP implicitly or explicitly references "buyer personas," that is, it explains specifically *who* wants what you have. If you find yourself writing a BVP yet wondering who wants it or realizing that the customer might "want it" but not yet "know it," don't freak out. Just realize that being innovative has its advantages and disadvantages. Henry Ford once said, "If I had asked people what they wanted, they would have said faster horses;" people wanted transportation; they just didn't (yet) realize that they wanted cars.

Another term that you may hear is *USP* or *Unique Selling Proposition*. Whereas a BVP emphasizes what you sell and who wants it, a USP assumes that you already know this and instead focuses on what's unique about what you're selling. USPs build on the marketing concept of **positioning**. Positioning answers the question, "What's unique about your product or service vs. that of the competition.

For now, let's return to how the USP builds upon, yet differs from, the BVP. For example, the BVP of both Pepsi and Coke is a carbonated, sugar-filled beverage that quenches thirst; yet, the USP of one is different from the other. Pepsi is often positioned as the soda for a "new generation," whereas Coca-Cola is positioned as a "classic" American drink. They're both soft drinks, but the former attempts to speak to the future, that is, young people who want something new and different, whereas the latter attempts to speak, not so much to the past, but to the idea of classic American values, something quintessentially American. Pepsi is also sweeter than Coke, so the product itself also reflects a unique selling position.

I think it's easier to write one BVP that contains the idea of your positioning – what's unique about your product or service- rather than writing a BVP and a USP. So, I just write BVPs. I also highly recommend that they be short, sweet, and to the point. Think "elevator pitch," not "Ph.D. dissertation." Don't get hung up on nomenclature.

A BVP needs to answer three questions:

1) What do you sell?

2) Who wants it?

3) What's unique about what you offer vs. the competition?

AI PROMPT. Continue the conversation with ChatGPT. Feed it your "rough draft" of your Business Value Proposition. Prompt it as follows, "With the information I've given you about what we sell and who wants it, write a 100 word Business Value Proposition of our company. Include references to our brand, our buyer personas, and our Unique Selling Proposition. Make it pithy, fun, and to the point!"

Your Business Value Proposition tells you "what you sell" and "who wants it." Your brand gives you the "warm and fuzzy" that you want your target customers to *feel* about your company. You and your company cannot succeed without a solid understanding of "what you sell," "who wants it (and why)," and the "warm and fuzzy" brand that you wish to nurture across social media.

» Investigate the Five Discovery Paths

Now that you have a BVP, we need to consider how customers discover you and – hopefully – become excited about your product or service, leading them to want to purchase it. Promotion is perhaps *the* most critical problem for marketers.

Why? If a customer can't find you, if a customer doesn't learn about you, or if a customer isn't jazzed about your brand, they can't or won't buy your product or service. And if you don't have a firm grasp on how customers discover you, you don't know where to put your marketing efforts. You can't *fish for the fish* when you don't know *where the fish are*. You'll be advertising on billboards when they use Google. Or advertising on Google when they use Facebook. Or focusing on organic posts on Instagram when they use reviews on Yelp. Or doing the Internet when they're all in the real world. Or sending postcards through the US mail, or using the print Yellow Pages when you've

been living in a cave for the last two decades and failed to realize that nearly everything (but not absolutely everything) is online.

HOW DO CUSTOMERS FIND YOU?

In short, many businesses fail to understand *how customers find them* (*Question #1*), how they, as marketers, can influence this process (Question #2), and how they can persuade customers to become *excited about their product or service (Question #3).*

How might 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 "pizza" into Google or Yelp. He browses available restaurants, chooses one, and shows up to get pizza. He *searched* for pizza. He *found* pizza. He *bought* pizza. The search path is the province of **SEO** (Search Engine Optimization), mainly on Google, but also on sites such as Yelp or Amazon, which work via "keywords" to help customers find what they want. **Google Ads** advertising or advertising on key search engines, such as Amazon or Yelp (where applicable), is also helpful on this path. AI is increasingly influencing this path as customers go to "Google AI overviews" or "ChatGPT" and ask, for example, "Give me a list of the top five wedding planners in New York City" or "Help me understand the pros and cons of organic coffee vs. non-organic coffee."

The key concept in **search** is that the customer knows what they want, and they proactively search for it.

TRUST. The trust path is based on "trust indicators." (Some marketers also call it "social trust"). In it, the customer already has created a list of vendors he might use, but he is researching "whom to trust." In this path, he might use the "reviews" and/or "stars" on Facebook, 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 a large number of followers and engaging posts can also serve as 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. The review / recommend / trust path is all about a customer "asking for help" from friends, family, business colleagues, or online review sites like Yelp, Amazon, TripAdvisor, etc. The key concept in review / recommend / trust is the reliance on *external validations* such as recommendations from friends or stars on Yelp.

SHARE. Wow! That pizza was great! Let me take a selfie of me chowing down on the pizza and post it to Instagram. Or, here is a cat video of cats at a pizza restaurant, puzzled by the self-serve soda fountain. It's "gone viral" on TikTok and has sixteen million views! Or, oh my goodness, Oprah has just recommended we read the novel *An American Marriage* by Tayari Jones, so let's buy it on Amazon and get started.

The **share path** occurs when a customer loves the product, service, or experience with enough passion to "share" it on social media – be that via electronic word of mouth (eWOM), a share on their Facebook page, a "selfie" on Instagram, or a viral video on YouTube. Others find out via shares from their friends or influencers, and suddenly, yours is the most popular pizza joint in town. Indeed, **influencer marketing** is a type of marketing that straddles both the review/recommend/trust marketing and the share path; an "influencer" like Kim Kardashian recommends new jewelry, and then everyone goes out to buy it. The *influencer* is a "trust indicator" par excellence, with the push of a share behind them.

In a sense, therefore, the "share" path is the flip side of the trust path. The key concept in sharing is when a customer or influencer proactively "pushes" their love of your product or service to friends, family, or business colleagues. The "share" path is more proactive, and the review / recommend / trust path is more passive, but they are closely related.

INTERRUPT. The interrupt path is the bad boy of marketing, both online and off. It's what we think of when we say "advertising," but it's somewhat broader than that. 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 it's the ads on TV that we "must" watch (and increasingly on Amazon now that it has corrupted Prime Video with unavoidable ads) before we can enjoy the live sports event we want to watch. Or, it's when you get a "cold call" or "spam email" from a recruiter who's viewed your profile on LinkedIn or when you get a spam email on "amazing Viagra." Interrupt is primarily **advertising**, and it's advertising to "push" products that people aren't actively looking for. But just because people hate it doesn't mean it isn't useful. Spam works, and so do TV ads.

BROWSE. The browse path is all about getting your message *adjacent* to what a person is reading or viewing. 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, you might find a video from Dollar Shave Club. Alternatively, you might see Dollar Shave Club videos suggested on the right side 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. Or you go to the mall "to shop" and happen to wander into a boutique, only to buy the newest dog toy - something that

you really hadn't been considering buying in the first place. Or you read a newspaper or journal or go to an industry trade show and just "happen" to notice a new product or service. The **browse path** is about getting your product or service *adjacent* to something the customer is looking at.

> **AI PROMPT.** Feed AI information on the five basic discovery paths. Then ask it as follows, "Using your knowledge of our business and our customers as well as this knowledge of the five discovery paths, explain in bullet list format, which paths (and which social media platforms) are the most for our marketing efforts. Be specific."

Once you understand the five **discovery paths**, you'll see that everything in "promotion" fits into one or more of these paths. There are both digital and non-digital examples of them. A door-to-door salesman, for example, is engaging in "interrupt" just as an unsolicited spam email or telemarketing call is, too. An ad on a billboard is "browse," just as an ad on The New York Times online is 'browse," too.

» Know Your Customer Journey

Next, realize that your customers aren't standing still (neither are your competitors nor social media). "AIDA" is one of the most common ways to describe the "customer journey" or "sales funnel" (other buzzword for how customers discover your business, get excited, and ultimately and hopefully make a purpose). "AIDA" stands for "Awareness," "Interest," "Desire," and "Action." The AIDA model postulates that a customer goes from "awareness" (*they become aware that your company, product, or service exists*), to "interest" (*they begin to compare/contrast your brand against the competition and against their perceived needs or wants*), to "desire" (*they become positively oriented towards your brand*), to "action" (*they take the step of a purchase*).

Along the way, the customer learns about your brand, becomes excited about it, and ultimately takes the final step of making a purchase. They **become aware of** your brand through advertising, word of mouth, and e-word of mouth. They **trust** your brand due to your online reputation, as well as the views and reviews of friends or family, and they purchase your product or service through either an e-commerce interaction or a real-world transaction.

Your goal is to promote your brand in appropriate ways along the customer journey. Your **to-do** is to map each phase of the customer journey and position your brand to be present and to positively perceived at each phase. Your next **to-do** is to examine

each stage (and any subordinate stages) and figure out the appropriate *messaging*, the appropriate *medium*, and the appropriate *mechanism* by which the customer will "see" your brand and "realize" it's compelling. Looking ahead, you'll see that in most instances, social media is an "early" stage medium (about discovery, excitement, and branding). In contrast, SEO and Google Ads (as well as your website) are "late stage" media, about making a purchase. Your website, SEO, Google Ads, and social media should all work well together. Don't think "either/or" but rather "both/and" as you build out a comprehensive marketing plan.

» Measure What's Measurable

Your final **to-do** is measurement. Marketing, after all, is a goal-oriented activity. Throughout this book, I will recommend tips and techniques to measure what's measurable yet be aware that "half your marketing dollars are wasted" even though "you won't know which half." (That's a famous quote by US merchant John Wanamaker (1838-1922)).

An easy way to do this is to imagine the customer journey from awareness to interest, interest to desire, and desire to action. Measure the impact of your brand at each step. As we review social media marketing, for example, we can identify KPIs that correspond to different phases of the "customer journey." For instance, we can measure the likes, comments, and shares of a Facebook post, as well as the growth of our YouTube channel subscribers. Within YouTube Studio, we can measure the "watch time" (which indicates how long customers watched specific videos). These "soft" KPIs show we are "building our brand" and resonating with potential customers. "Hard" KPIs might be people who sign up for a "free webinar" or reach out for a "free consultation," or if we are running an e-commerce website, sales that originate from an Instagram post or via the sales function on TikTok.

The (ultimate) goal of marketing is to sell more stuff, and if they hesitate at the precipice of purchase, then something's wrong with the messaging. Are you getting leads? Are these converting to actual sales? If so, why? If not, why not? If you get a fantastic brand response yet your sales are flat, debug what's wrong and fix it. Throughout this Workbook, look at each aspect not only from the perspective of your buyer personas but also from their location along the customer journey.

»» CHECKLIST: MARKETING BASICS

Test your knowledge of the "Big Picture" of Marketing Basics! Take the *Marketing Basics* Quiz at **https://jmlinks.com/qzmb**. Next, here are your "Big Picture" **Action Items**:

❑ **Educate** yourself on the basics of marketing.

❑ Define your "brand" – both your "skills" (what's useful) and your "attributes" (what's fun) about your brand.

❑ Identify your buyer personas. Who wants what you sell? Why? What are their characteristics – demographics, psychographics, and situationals?

❑ Write your **Business Value Proposition**.

❑ Conceptualize a short, to-the-point summary that defines what you sell, who wants it, and what's unique about your product or service vs. the competition.

❑ Write a USP ("Unique Selling Proposition") that positions what you sell vs. the competition. What's unique about your offer? Why should a customer choose you over the other guy or gal?

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

❑ **Know your customers' journey.** Your customers start with a "need" or a "desire," and you must move them along the AIDA (Awareness, Interest, Desire, and Action) path. Looking to the future, brainstorm how and where your marketing messages can effectively appear at each stage and which platforms (e.g., Google, Yelp, Facebook, Instagram, LinkedIn) might be most effective.

❑ **Measure what's Measurable** (and write down) your **KPIs** (*key performance indicators*), both "soft" and "hard." Marketing aims to "build a brand" ("soft") to "sell more stuff" ("hard), and it's not an either/or it's a both/and task.

»» 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 **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), and click on the link to the "Marketing Plan Worksheet." By completing this plan, you and your team will establish a clear vision of what you want to achieve through your marketing efforts as a whole.

2
PARTY ON - SOCIAL MEDIA MARKETING

You know the 1983 song "Girls Just Want to Have Fun" by Cyndi Lauper? Or the 1991 movie, "Thelma and Louise?" The YouTube video of the former now has over 2 billion views, and the ending scene of the latter has over 1.9 million views. Here's the upshot: people (not just girls) want to have fun. Sometimes, it works out well, as in the Cyndi Lauper song, and sometimes, not so much, as in the "Thelma and Louise" movie – but in all cases, people are looking for pleasure and avoiding pain.

They go to Facebook to see posts by friends and family, they go to Instagram to see pictures and videos, they go to Pinterest to find cool stuff to buy or make, and they (increasingly) go to YouTube shorts, Instagram Reels, and TikTok to "be entertained." You can even claim that they go to X to "have a good argument" because there is nothing more fun than being on the "We're Totally Right, and the Other Side is Idiots" team on X, relishing in one's own virtue, knowledge, and just general goodness vs. the evil, horrible, nasty people on the other side. **People want to have FUN on social media**. That even includes LinkedIn, which is the most serious and most career-oriented platform. What is more "fun" than being knowledgeable about your job (and getting a big raise) or finding that dream job for your career advancement?

Social media is all about "fun." It's a party and you – my friend – are the party-organizer. I want you to learn to throw fantastic parties on Facebook, elegant career mixers on LinkedIn, and over-the-top jams on TikTok and YouTube. I want you to be Cyndi Lauper, with thousands of adoring fans, and not Thelma and Louise careening over a canyon to their doom (oops, spoiler alert).

If the previous Chapter was about how to "think" about marketing in general, this Chapter digs into the next level: social media marketing? How do you "build your brand" to "sell more stuff" on social platforms like LinkedIn, Facebook, or even TikTok?

Let's get started!

To-do List:

- » Understand that Social Media Marketing is Like Throwing a Party
- » Identify Companies-to-Emulate and Competitors
- » Recognize the Social Media Marketing Illusion
- » Know the Question and Find the Answer
- » Understand "Traditional" Social Media vs. "Recommendation Engines"
- » Establish Goals and KPIs
- » Remember the Big Picture
- »» 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 spouted out various meets and greets to other guests, ate the *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** X? Facebook? Instagram? LinkedIn? TikTok? 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 altogether different from **using** social media.

This Chapter explores the basics of social media *marketing*: **throwing** the "social media party" vs. just **showing up**. As we saw in Chapter 1, that word *marketing* is essential:

we're exploring how to use social media to *build our brand* and to (ultimately) *sell more stuff*. Our mission – as social media marketers – is to nurture a "tribe" around our brand, a "tribe" of potential customers, actual customers, superfans, and maybe even an influencer or two to spread our brand message across Instagram, LinkedIn, Facebook, YouTube, and the like. Ours, my friend, is a "party with a purpose" – a "marketing" purpose of brand-building and stuff-selling.

BECOME A GREAT SOCIAL MEDIA PARTY ORGANIZER

Social media **marketing** is the art and science of **throwing** "great parties" on TikTok, Facebook, LinkedIn, Pinterest, and the like in such a way that people not only show up to enjoy your "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 a few key 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 face-to-face, 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 X, or your LinkedIn to your blog, advertising, or even using "real world" face-to-face invitations like "Hey, follow us on Facebook to get coupons and insider deals."

Party Theme = Brand Messaging. Is your party a hooty-snooty Stanford "wine and cheese" event to discuss current trends concerning Federal interest rate policy? Or is it an over-the-top crazy Frat party with kegs of beer, wild and inappropriate behavior, and just barely avoiding the police being called? Is it more like a wedding? Or perhaps more like a Mexican quinceanera, a Jewish bar mitzvah, a Bible study, or a group of like-minded mountain bikers who want to get together and tear up the local trails? ALL are parties, but they have unique "themes" and "cultures." As with any good party, your social media "brand messaging" and "brand iconography" should be consistent across your social media platforms.

Food and 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? "Content," as we shall see in the next Chapter, is the "food and entertainment" that draws people to your Facebook, Instagram, TikTok, etc., and keeps them coming back for more.

Party Hosting = Ongoing 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" obnoxious attendees. New for 2026, you may have an "AI Assistant," whether it's ChatGPT, Gemini, Perplexity or some other AI engine that is your virtual helper as you build out content and measure results. But you, my friend, are still the ultimate boss of the party even with a little help from AI.

It's a Party and Not a Prison. Social media isn't like a prison warden giving a speech. It's not like a boss at a corporate event. Rather, it is more like a street performer entertaining a crowd in Venice Beach, California, who is amazing, cool, funny, and engaging! SHE STOPS TRAFFIC AND SO MUST YOU. Even that serious Stanford party discussing Federal interest rate policy needs to have some good wine, some fine cheese, and some friendly camaraderie. B2B, B2C, and even B2G – don't be boring!

SOCIAL MEDIA MARKETING IS THROWING A 24/7 PARTY ONLINE

Finally, you want to think like a "party detective." Let's assume you're going to throw your spouse an amazing 40th birthday party. Before that party, you'll probably start attending other gatherings 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. You want to do the same in social media.

Inventory Other Parties

Throughout our social media journey, I want you to "inventory" other parties and create a list of likes and dislikes, ideas, and do-not-dos. Use that information to plan your own social media "party" systematically.

As a social media marketer, therefore, you should "attend" the parties of other brands online. Identify brands you like (some of my favorites - REI, Whole Foods, Rustic Cuff, Chipotle, Author / Actor Matthew McConaughey, Bishop Robert Barron, CEO Jeff Bezos, fitness guru Shaun T, nerd brand Thermo Fisher Scientific), "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. These are what I call your "companies-to-emulate." Parallel to this, do the same in your own industry. Follow **competitors**, again, with the goal of "reverse engineering" their social media marketing strategy, successes, and failures.

For your first **TO-DO**, identify some brands or public figures you admire and "follow" these "companies to emulate" on X, LinkedIn, Facebook, TikTok, etc. Supplement with your competitors. Build an on-going list of what you like or dislike based on reverse engineering their online strategy. Imagine you are on Fraternity Row at the University of Alabama. It's Saturday night, and every Frat house is throwing a party. You want yours to be the best, the one that the "customers" stop in at, think it's fantastic, and hang out. You might even want them to "join" your fraternity. (And, of course, you're going to keep it classy and not be the "bad boy" frat that goes to the extreme and gets kicked out, *Animal House* movie style).

Build out your list of companies-to-emulate and competitors as followss:

1. **Log in** to one of your **social media accounts** (e.g., X or Facebook). If you already know your companies to emulate and your competitors, identify their websites and social media accounts (e.g., Facebook, Instagram, LinkedIn, YouTube). Bookmark and "follow" each of them.
2. If you don't know the companies, you can conduct some research to identify potential prospects. Here's how. Using the search function on each platform (e.g., Facebook or Instagram), **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, such as *site:network*, as in *site:facebook.com* "accounting firms", to use Google to find interesting items on any social media site rapidly. Note: there is NO SPACE between the

":" and the network. Visit **https://jmlinks.com/12v** to see this search query in action. You can also watch a **video** on this at **https://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 among your customers on theme X or theme Y – identify which topics are relevant on social media. Visit **https://jmlinks.com/smmdash** > keyword tools to begin.

3. **Bookmark or follow 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. Do the same for their LinkedIn, TikTok, Instagram, Pinterest, etc., accounts.

4. Begin to **inventory** what you **like** and **dislike** about how they are running their social media effort. For Facebook, for example, do you like their cover photo (that is, the extended rectangular photo or video at the top of a brand's Facebook Page)? Why or why not? Do you like their profile picture (i.e., the smaller square image that appears in posts by the Page)? What about the items that they post – text, photos, videos – and/or the "themes" of their content? Imagine you are attending their party not "to have fun" but to "reverse engineer" how they are putting it on. What works? What doesn't? Write this down on a spreadsheet or document.

We'll return to this process for each platform, but whether you're an experienced social media participant or not, start to look at social media as "parties" and start to step back and ponder what's going on on X, Facebook, YouTube, etc., as the work of "party organizers" in interaction with "party attendees." You want to pay attention to how other "party organizers" are doing at your companies-to-emulate and competitors. It's not cheating! It's called "market research."

A Party with a Purpose

Another fact to notice is that brands like Whole Foods or REI, or public personas like Khloe Kardashian or Shaun T – in contrast with the average John Doe or Sally Jones - are on social media for an "ulterior motive," usually to "build their brand" and "sell

more stuff." Social media marketing, in short, is throwing a *party with a purpose*. While the birthday party you're throwing for your spouse on her 40th birthday is hopefully just a labor of love, corporate parties are not so benevolent. For example, the real-world corporate parties I've attended in Silicon Valley have a clear business objective. You may show up at the Synopsys 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 partygoer – to listen to a spiel by their CEO or product marketing manager about their latest product. They want you to get a "warm and fuzzy feeling" about their brand and think of them the next time you're ready to make a purchase.

The same is true for corporate "parties" on social media marketing. Their Facebook Pages, their YouTube accounts, and even their TikTok accounts are not built "just for fun." Instead, each has a goal ("build the brand to sell more stuff"), which you can generally break down into two interrelated subgoals:

- Build **brand equity** among target customers, giving them a warm and fuzzy feeling that they "like" the brand so much they'll be favorably inclined to buy its product and/or service and/or -
- **Get a sale by selling the product or service immediately**.
    - Or, a few steps before the sale, a goal might be to sign up for an email newsletter or generate 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 they're subtle about it (*get that warm and fuzzy feeling*), or they're aggressive about it (*act now, and get a special discount for following us on Instagram*), social media "parties with a purpose" aren't the same as a family party or gathering. Brands want something from their attendees: better **brand equity** (that "warm and fuzzy feeling") and, ultimately, more **sales**.

BUILD YOUR BRAND TO "SELL MORE STUFF."

As you begin to pay attention to competitors and companies to emulate, I want you to be cynical and look for the goals behind their "parties with a purpose" on platforms like X, Facebook, LinkedIn, TikTok, 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? What's in it for their customers? And what's the *quid pro quo* of why users show up at the party while the party organizer goes to the trouble and expense of throwing the party? What's REI's goal for its Facebook page vs. what are the reasons why users show up at REI's Facebook "party?" Why do users watch Martha Stewart on YouTube, and why does Martha Stewart go to the trouble of building out a fantastic YouTube channel?

And as for you –

> **AI PROMPT.** Explain to ChatGPT that "social media" is a party and you are the party organizer. Feed it your BVP and buyer personas. Then, ask it, "If our social media marketing is a party, why would our customers come to our party, stay at our party, and tell our friends about our social media party? Be fun and specific with your ideas and recommendations for the 'why' behind our social media marketing strategy."

» IDENTIFY COMPANIES-TO-EMULATE AND COMPETITORS

Let's dig in further into the companies to follow problem. Everyone instinctly gets "competitors," but there are actually two sorts of companies that you want to identify:

1. **Companies-to-emulate**. Identify big brands that may not be in your industry but excel at social media. Many big consumer brands, such as Wendy's, Chipotle, Target, REI, Thermo Fisher, and even Shaun T, are crushing it on social media. These are companies that, while not necessarily like your own, are the *superstars of social media*.
2. **Competitors**. Search by keyword or relevant content themes for your company on Facebook, X, LinkedIn, etc., to identify competitors that are similar to you. Take your "real world" competition, visit their website, and track down their social accounts. These competitors are companies *similar to your own*.

Here's the deal. Your companies-to-emulate should not only be in your industry. They are most likely to be in B2C (business-to-consumer) as that is where the most successful social media brands are. A few, such as Thermo Fisher, are B2B and do social media well. As for your competitors, however, it may be that they are very poor at social media.

That's good news for you, but what it means is you cannot use your competitors as "companies to emulate." *If you emulate your competition, you will always be behind.*

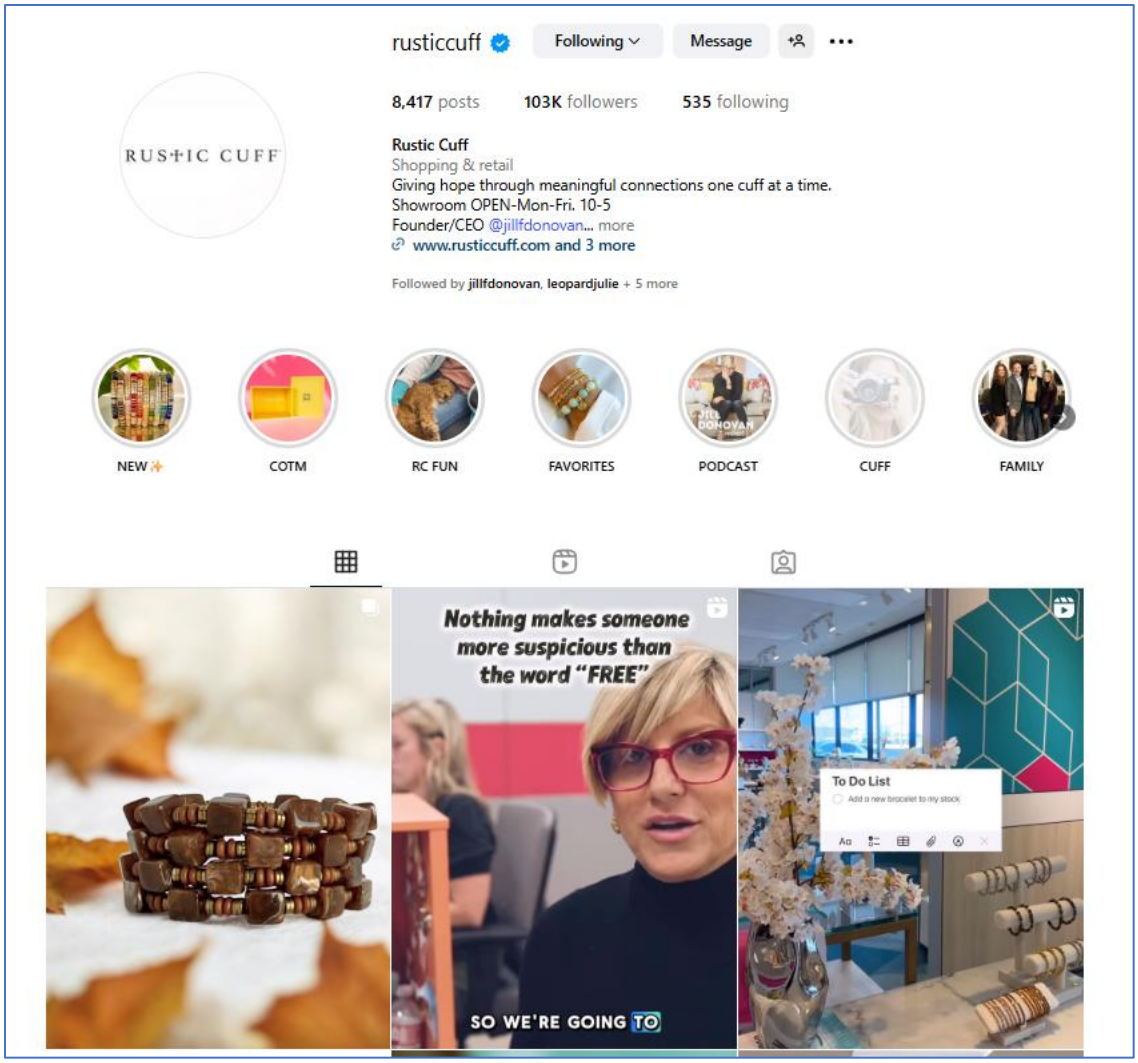
Thus, I strongly recommend you identify five to ten "companies to emulate." Follow them across all the platforms. "Reverse engineer" everything that they are doing from set up to content. These companies will help you generate ideas and keep you up-to-date with what innovative brands are doing. Then take this knowledge back to your own sad, pathetic, and out-of-date industry and DOMINATE it.

Look to the Rustic Cuffs, the Shaun T's, the REI's, the Chipotle's, the Thermo Fishers, the Wendys of the social world for **ideas** and **inspiration**.

A Brand Example: Rustic Cuff

Let's dig into one of my "brands-to-emulate." It's called "Rustic Cuff," and it is a Tulsa-based, women-owned business that produces artisan-style bracelets. Visit their website at **https://www.rusticcuff.com/**, and, on the top right, click over to their social icons. You'll see that they're active on Facebook, Instagram, Pinterest, and YouTube. For extra credit, you may want to note that their powerhouse CEO, Jill Donovan, has her own social media presence as a top female author, entrepreneur, and inspirational speaker at **https://jilldonovan.com**.

Here's a screenshot of their Instagram account (**https://www.instagram.com/rusticcuff/**):

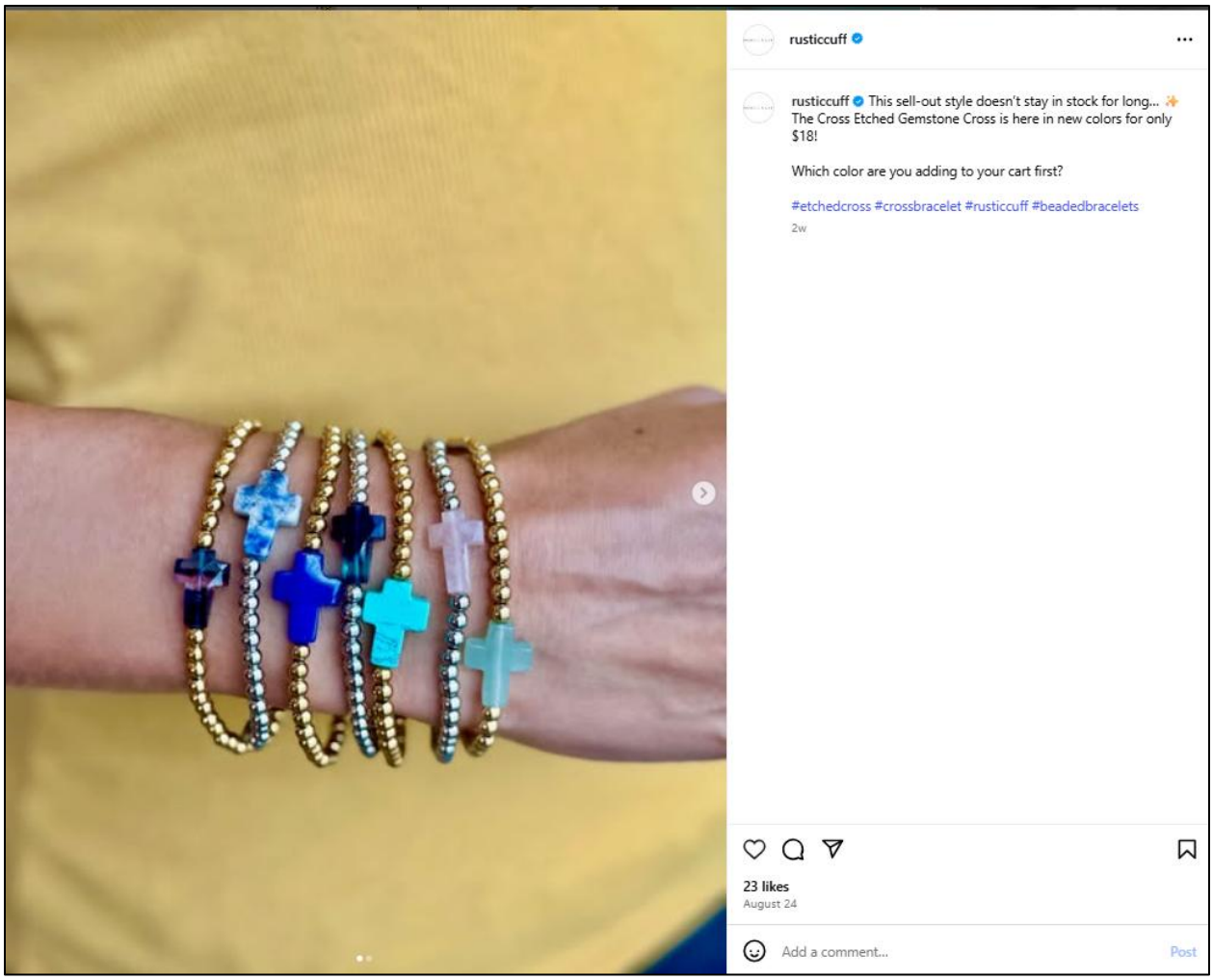


Notice that they post often (over 8,417 posts), that they have 103,000 followers, and that their posts are visually "fun." Next, step back, scroll through their account, pay attention to what they're posting, and be a bit cynical. Rustic Cuff isn't a charity, after all. This is a *business*, one that aims to build its brand and sell more products. As you pay attention to Rustic Cuff's posts on Facebook, Pinterest, and Instagram, you'll notice two types:

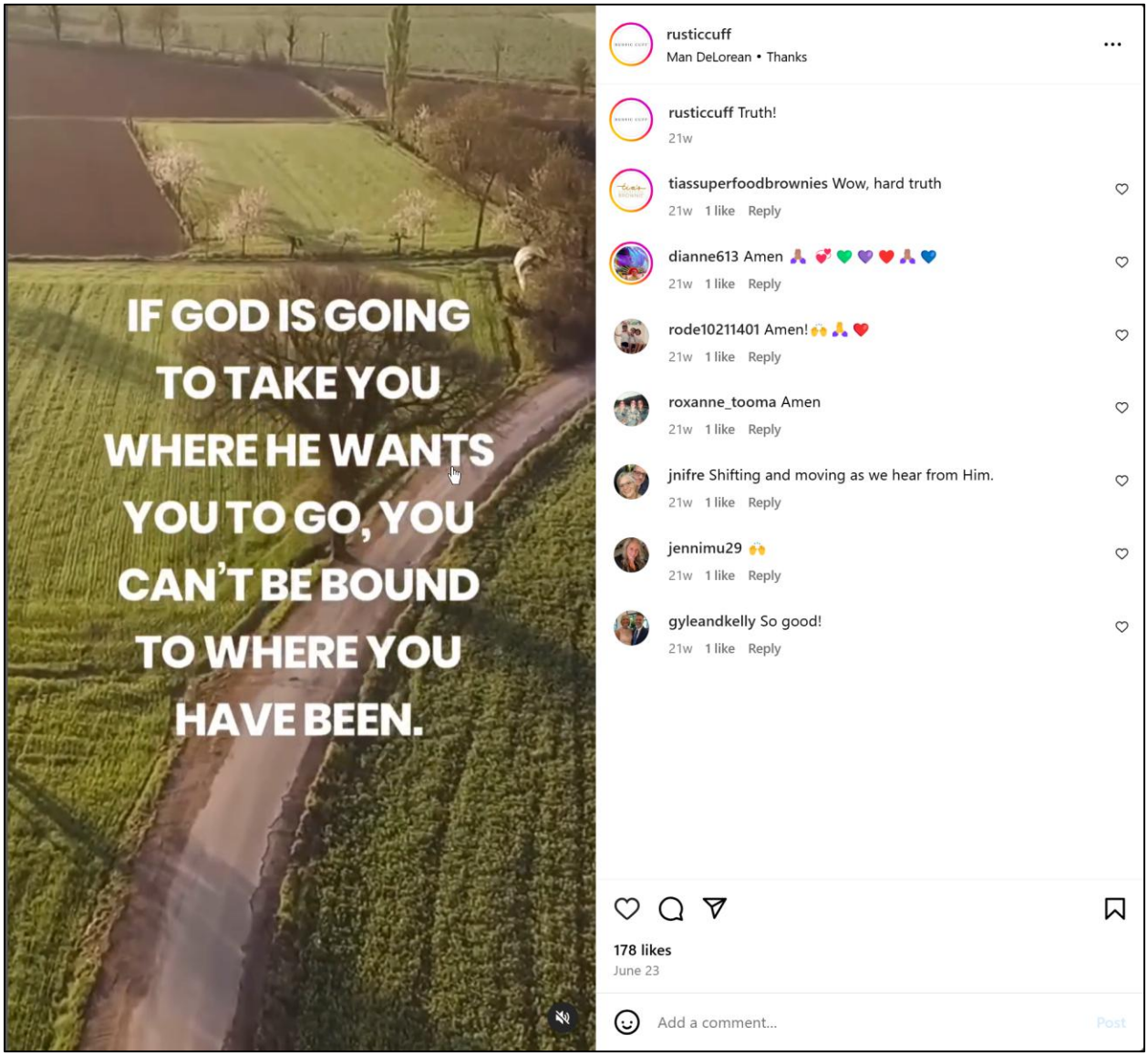
> **Buy Our Stuff Posts.** These are posts that, rather shamelessly, connect the social media experience with an "act now!" feature to encourage users to visit RusticCuff.com and make a purchase. **Purpose**: to encourage people to purchase their jewelry.

Fun Posts. These are posts either by Rustic Cuff or by users who seemingly share their passion for beautiful jewelry and stylish stuff. **Purpose**: build the brand.

For example, here's a "buy our stuff" post to Instagram announcing their "Cross Etched Gemstone Cross" bracelet:

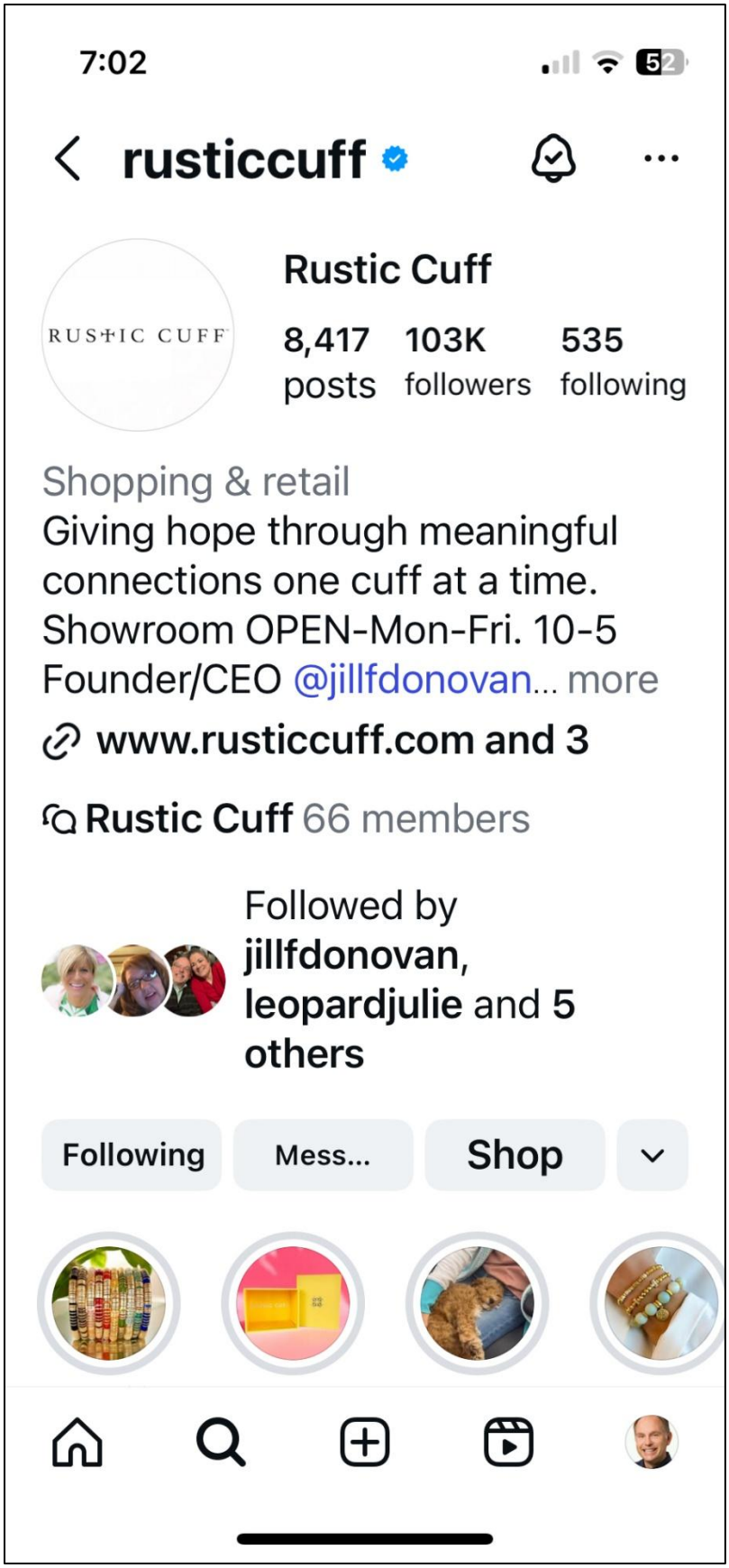


This is a shameless "buy our stuff" post, which contrasts with inspirational quotes from their CEO. RusticCuff is a Christian brand that posts inspirational Christian quotes such as the following:



Here's the insight. Both posts work towards marketing. The second is a "build your brand" post that establishes the business as an inspirational, Christian-motivated jewelry brand. The first is a shameless "buy our stuff" post. Your to-do here is to follow brands you like and "reverse engineer" what they post – photos, videos, text, etc, and the "themes" that they touch on, categorizing some as "build the brand" posts and some as "buy our stuff" posts.

Indeed, here's a screenshot of their Instagram account on the mobile app (where most people use Instagram). Notice the prominent link to "shop," that is – **yes, please** – you can purchase their products via Instagram:


7:02
rusticcuff
Rustic Cuff
RUSTIC CUFF
8,417 posts
103K followers
535 following
Shopping & retail
Giving hope through meaningful connections one cuff at a time.
Showroom OPEN-Mon-Fri. 10-5
Founder/CEO @jillfdonovan... more
www.rusticcuff.com and 3
Rustic Cuff 66 members
Followed by jillfdonovan, leopardjulie and 5 others
Following
Mess...
Shop

For every company you follow on both the desktop and the phone, spend some "quality time" exploring the structure of their account (icons, features, etc.), and the content itself. In reverse engineering Rustic Cuff's content strategy, one sees a) buy-our-stuff posts, b) inspirational or brand-building posts, and c) the enablement of the Instagram shop feature to make it easy to purchase products. Start paying attention to the marketing side of your companies to emulate and competitors, with an eye to the types of content they are posting, the engagement that content is getting in terms of likes, comments, and shares, and the enablement of shopping features. You'll see quickly there is a method to the madness, and that some brands do it quite a bit better than others. It's a party, after all, and some parties are funner than others. With the knowledge you obtain, go back to your own content marketing across platforms and imitate out what you've learned.

» RECOGNIZE THE SOCIAL MEDIA MARKETING ILLUSION

As you begin to identify and monitor brands you like on social media, you may conclude that it's either really easy or they are just geniuses. Rustic Cuff does a spectacular job, after all. And so do REI, Chipotle, Thermo Fisher, and Shaun T.

Successful social media is based on **illusion**, however, just as successful parties are based on illusion.

How so?

Let's think for a second about a fantastic 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 organizing such an event – what was that like? Was it fun? Was it magical? Yes and no, but it was probably also a lot of work, "in the background," to ensure that the party ran smoothly.

Great parties have an element of **illusion** to 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 Taylor Swift or Lady Gaga on YouTube, Whole Foods on Facebook, or blogging, Airbnb or Aeromexico on Instagram, Chipotle or Wendy's on TikTok, or REI, Zappos, Burt's Bees, or even Nutella on X)* create an illusion. They (only) "seem" spontaneous; they (only) "seem" effortless. However, in the background, a significant amount of work is underway 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 your boss. Managers and bosses might mistakenly believe that "social media is easy" and/or "social media is free." You, as the marketer, might have to educate them 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 in 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 **TO-DO**, 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 companies-to-emulate and competitor efforts to **setting up basic accounts** on X (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 may not require a significant amount of money, social media marketing does require a substantial 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!*

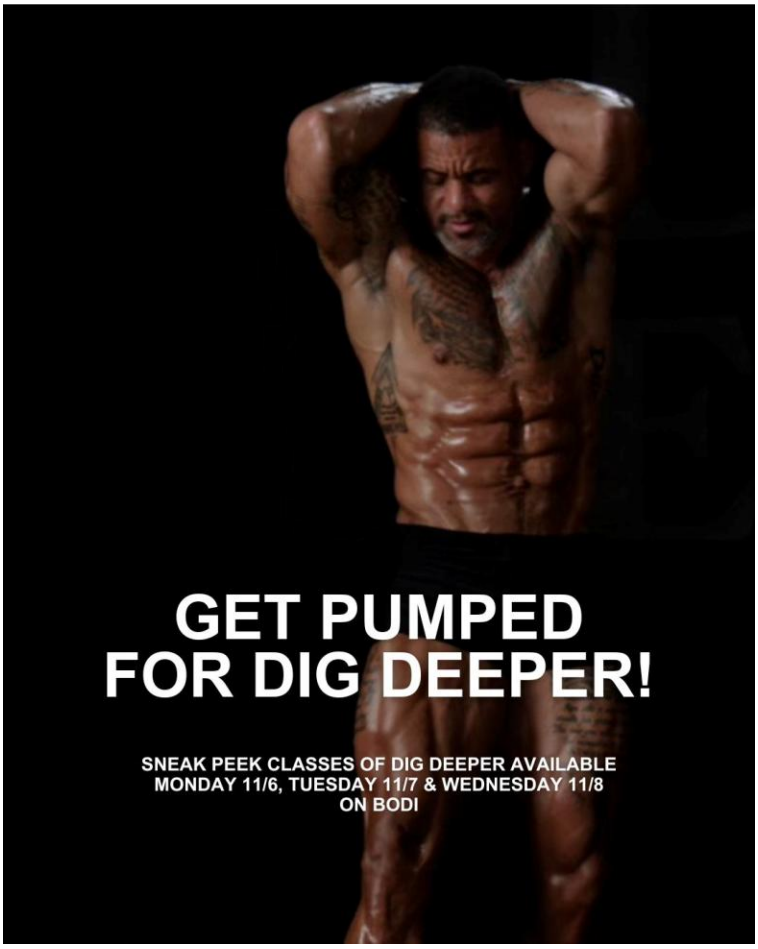
Now, *please don't get discouraged or overwhelmed.* It may seem complicated and overwhelming, but once you understand the process and become systematic in your approach, you can achieve excellent social media marketing results in just a few hours each week. Like preparing to get in shape, you'll need to commit to regular activities. But, like getting in the best shape of your life, thousands of people do it and do it well. It takes discipline, but YOU CAN DO IT!

> *Imagine me greased up and sweating like Shaun T with my shirt off, jumping rope in front of you, yelling, ARE YOU READY? Pop music is blaring; one of my groupies is saying, "It*

takes real work. It takes real effort, and guess what – that's just the warm-up!" Electrifying pop music is blaring over the loudspeakers. My ab muscles are jingling in front of your desk, and I'm leading you and your team (plus your boss) in a chant: WE CAN DO THIS! WE CAN DO THIS!

Now, stop imagining me as Shaun T. It's getting weird.

And here's a screenshot of the latest post from the amazing, incredible, motivational Shaun T fitness guru Facebook Page (at 1.9 million followers) at **https://jmlinks.com/52v**.



Notice how Shaun's inspiring you to get "pumped" for "digging deeper," which links to a free "sneak peek" of his "paid" classes? Shaun doesn't just have six-pack abs. He wants you to get them, too, by purchasing his paid training after you envy that incredible body!

I'm not even a real Shaun T fan (I have 12-pack abs, that is, two times the desired six-pack). But I admire anyone with 1.9 million followers on Facebook, 1.2 million followers on Instagram, and 233K on YouTube. Not to mention TikTok with 1.4 million followers of this unbelievable fitness guru and motivational man. Like Jill Donovan of Rustic Cuff, Shaun T projects an amazing can-do spirit, one that combines motivation with the technical knowledge of how to get in shape. Add Shaun T to your list of companies to emulate.

Then, let's get back to our computers, potato chips, and iPhone cameras and make an incredible social media marketing strategy for your business! We can do this! Sitting down! Burning no calories! Munching on potato chips!

» 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 schedule my posting to X?"

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:

OK, let me be serious. Once you formulate a specific question, such as "What is the character limit of a post?" or "What is a branded hashtag?," you can Google it, to find the answer.

IF YOU KNOW THE QUESTION, YOU CAN GOOGLE THE ANSWER

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. Now that Facebook allows videos as cover photos, you can Google, "How do you set up a video as your Facebook cover?" You can type specific questions 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 for finding 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 or look up YouTube videos that show you how to do such-and-such step-by-step.

Third, if you aren't already using the new AI platforms, I highly recommend signing up for a paid account. I use ChatGPT (**https://chatgpt.com/**) to ask questions and receive answers. (You can also do the same with Google Gemini or Google "AI mode.") For example, you can ask it, "Give me five short script ideas for a YouTube video on our new chair weight loss program," and it will generate a wealth of ideas. Or you can ask it, "How can I encourage reviews on Facebook," and it will help. ChatGPT is my new "social media assistant," and I use it almost daily.

> **AI PROMPT.** Formulate a question such as "What are the best hashtags to promote a line of organic cosmetics on Instagram?" and then ask ChatGPT for help. Ask another question such as "What would be some good ideas for a video post on our cosmetics."

Fourth, all of the social media platforms have official help files, such as **https://help.twitter.com** or **https://www.facebook.com/help**. You can use Google to search for your questions and access the official help files directly. Ironically, the technical aspects of social media marketing, such as "how to share a YouTube video?" or "what are the character limits to a Tweet?" are actually easy to solve. **Once**

you know the question, you can search for the answer on Google, YouTube, or ChatGPT.

» UNDERSTAND "TRADITIONAL" SOCIAL MEDIA VS. RECOMMENDATION ENGINES

Throughout our social media journey, I want to convey to you a new structural reality: the difference between "traditional" social media and the emerging AI-based "recommendation engines."

In "traditional social media," as in Facebook, a person has an account and then friends other people via "friend requests." He then sees in his newsfeed posts by his (connected) friends and – to a lesser extent – from brands that he has "liked" on Facebook. He might see, for example, a post from his mountain biking buddy showcasing his latest mountain biking trip and another post from the retailer REI showcasing tips and tricks for better camping gear. Structurally, he "liked" a friend and he "liked" a Facebook page. Thus, as marketers, your goal is to "get likes" for your Facebook page, hoping that your content will be pushed into the feeds of those consumers who already like your page. (It's more complicated than this, but bear with me as I am building out a simple structural model).

- For "traditional" social media, therefore, **your goal is to "get likes"** from customers to your accounts and to your posts. *Here it's you as a brand that pushes content to people who have "followed" you, and then from them to people who follow them, etc.*

The new trend, however, is called "recommendation engines," of which TikTok is the premier example. Here, it doesn't really matter which people or brands this proverbial customer "likes" or "follows." Rather, if he likes mountain biking, he'll pause on mountain biking content to watch it (as well as like, comment, and share this content). In the background, the AI-based "recommendation engine" will then push more mountain biking content to this user and predict that someone who likes mountain biking might also like outdoor themes, such as camping, hiking, and skateboarding.

- For "recommendation engines," **your goal is to create engaging content** (especially video) that the AI engine can understand and push to people who confirm that content's value by watching it, liking it, commenting on it, and sharing it. *Here, it's not your followers that push your content. It's the AI algorithm itself.*

These are not "either/or" propositions. However, the trend toward AI shifts the focus of social media marketing from "getting likes" to "creating engaging content." In fact, you could argue that we are all "content marketers" now, even if we don't realize it.

» 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 investing so much time, effort, and resources in social media marketing, anyway? Is it paying off?

In today's overhyped social media environment, many marketers feel like they "must" be on X, they had better get on TikTok, or they "must" have a presence on Pinterest, etc. All of the social media companies – Facebook, X, Pinterest, TikTok, 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.

Social media excels at the "soft goals" of growing brand awareness, nurturing customer conversations, and encouraging reviews, but it is less effective at achieving immediate, direct goals like lead captures or sales. Here are common goals for social media marketing:

> **eWOM (electronic Word of Mouth).** Every brand wants people to talk about it positively, and today, much of that conversation takes place on social media. If you are a local pizza restaurant, you want people "talking" about you and your pizza on Yelp, on Facebook, on TikTok 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 includes positive conversations on Facebook, reviews on Yelp or Google My Business, relationships between customers and us, and the sharing of our brand across various media.

Customer Journey. *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 that I've written a positive review on Yelp, created a YouTube video of myself eating your pizza, taken a selfie for Instagram, and even started a new blog on Tumblr about your pizza. As marketers, we aim to encourage customers to progress along the customer continuum: *from prospect to customer, customer to fan, fan to superfan, and superfan to evangelist*.

Superfans vs. Influencers. A primary goal of your social media marketing, therefore, is to encourage "superfans." Superfans are individuals who love your brand so passionately that they not only follow you on Facebook, but also connect with you on LinkedIn or subscribe to your YouTube channel. They like, comment, and (most importantly) share your content with others. *If you're Jesus, these folks are your disciples.* They spread your message (often for free). They can be compared with "influencers," who are people who have their own followers and "sell" their influence to the highest bidder. Think "free word-of-mouth" (Superfans) vs. "paid endorsements" (Influencers). Both are useful, but a major goal of social media is to nurture a tribe of "superfans" around your brand.

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, especially mitigating "customers from Hell."

Social Trust. Customers want pizza. Customers read reviews. Customers use reviews to decide which pizza restaurant is probably good. Similarly, when customers want to visit a theme park, they might check out the park's Facebook page. They prefer theme parks with lively Facebook pages over those with boring

ones. **Social trust indicators** are all about mental "shortcuts" that customers make to identify possible vendors, services, or products. A common goal of social media marketing, therefore, is to nurture positive social authority indicators about your brand online, including reviews, but not limited to them.

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 X so that 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 to be addicted to my fun Instagram feed my clever TikTok, 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 post pictures and videos on Instagram of their happy kids having a great pizza party at your pizza restaurant! You want your customers to share posts about their fantastic 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 key goal for SMM.*

Sharing Metrics. As social media evolves into an AI-based "recommendation engine" system, marketers must measure the "virality" of their content. Does your video get likes, comments, and – most importantly – shares? Which content did the algorithm prefer as measured by view counts? Which content flopped at launch? Why and why not? Mastering the algorithms means mastering (and measuring) why and how video A went viral while video B flopped.

Your **TO-DO** here begins by simply taking out a piece of paper, 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.

The Virtuous Circle

When you add up all the goals listed above, and probably a few you may have identified that I've missed, you arrive at the **virtuous circle** of social media marketing. When your social media marketing efforts are working well, you can create a positive feedback loop.

The more positive reviews you have on Facebook, the more customers you get, the more positive reviews you get. The more followers you get on X, the more chances you have to get them to share your discounts, and the more discounts they share, the more followers you get. The more people who like/share/comment on your Facebook page, the better your score in the Facebook algorithm (a measurement of how engaging one's content is), the better your reach, the more people see your content, the more people see your content, the more shares you get on Facebook, the better your reach. The more people who watch your TikToks, the better the algorithm pushes you out to new prospects, which causes more people to see your TikToks…

NURTURE A VIRTUOUS CIRCLE

Nurturing a virtuous circle should be a primary goal of your social media marketing efforts. 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 **TO-DO**, download the **Marketing Goals Worksheet**. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), 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 more specific objectives, tailored to a social medium like YouTube, X, 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 companies-to-emulate 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 see that "traditional social media" is based on likes vs. "recommendation engines," which are based on content engagement.

And you've realized that once you've identified your goals, identified relevant social media, and 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'll need to please both your fans and the social media recommendation algorithms.

You've understood that **promotion** and **content creation** are the big ongoing tasks of successful social media marketing. Keep this "Big Picture" in the back of your mind as you dig into the technical details. You are "building your brand" to "sell more stuff," one tiny post (post, video…) at a time.

»» CHECKLIST: SOCIAL MEDIA MARKETING ACTION ITEMS

Test your knowledge of the "Big Picture" of Social Media Marketing! Take the *Social media marketing quiz* at **https://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?
  - ❑ Identify ***competitors*** to reverse engineer as well as **companies/brands/influencers to emulate**. "Like" their Facebook pages, "follow" them on Instagram, etc.
    - ❑ Begin to reverse engineer what they are doing on social media. How are their accounts set up? What **technical features** are they using on each platform? What type of content are they posting – their own, other people's content, UGC (User Generated Content), or interactive?
    - ❑ What **content** is getting the most engagement as measured by likes, comments, and shares? Why might this be so?
    - ❑ **Imitation** is the highest form of flattery. What structural or technical aspects do you see in use by competitors or companies-to-emulate that you can use? What content strategies do you see being deployed that you, too, can utilize?
- ❑ **Identify** the two paths – "traditional social media" and "recommendation engines," realizing that the former means you want to "get likes" while the latter means you want to "drive engagement."
- ❑ **Learn to Google, YouTube, and ChatGPT.** Learn to formulate a question as you "reverse engineer" what other brands are doing on social media, and then Google, YouTube, or ChatGPT the answer. If you see a brand using a "duet" on TikTok, for example, Google "How do you do a duet on TikTok." If you see a

CEO posting an "article" to LinkedIn, Google "what's the difference between an article and a post on LinkedIn." If you can formulate the question, you can often find the answer via these search platforms.

❑ **Identify** the platforms (Facebook, LinkedIn, TikTok, X, etc.) that seem to be "where your customers hang out." What are they doing there? What content is engaging them and why? What are competitors doing? We will revisit this issue as we review each platform, but you have to start somewhere. Start looking at platforms through the lens of your customers.

❑ **Formulate** (and write down) your **KPIs** (*key performance indicators*) or social media marketing **goals** such as eWOM, movement along the customer continuum, preventing "customers from hell," growing trust indicators, staying top of mind, or leveraging 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 2, your first **DELIVERABLE** has arrived. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), and click on the link to the "Social Media Marketing Plan Big Picture Worksheet." By completing this plan, you and your team will establish a clear vision of what you want to achieve through social media marketing.

3
CONTENT MARKETING

If social media *marketing* is throwing fabulous 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, "content," in short, is the "food and entertainment" of social media marketing. It's simple if you think about it. *No food, no party. No great food or entertainment, no great party.* You gotta have **content** just like you gotta have food and/or entertainment to get your party started (and keep it going).

Whether it's Instagram or Pinterest, Facebook or LinkedIn, YouTube or TikTok, you need to create and maintain a **content marketing machine** – a nearly endless series of blog posts, infographics, memes, photos, posts, and/or videos that will feed the hunger for content of all your social channels.

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!

TO-DO LIST:

- Understand the Basic Content Structure of Social Media
- Brainstorm Engaging Content
- Identify Content You Can Easily Produce
- Identify Content Formats
- Identify Buyer Personas and Keyword Themes
- Produce Your Own Content on Schedule
- Blog, Blog, Blog: You Gotta Blog, Vlog, Phlog, and Post
- Curate Other People's Content
- Encourage User-Generated Content
- Interact with Interactive Content
- Carrot and Outreach Marketing

»» Checklist: Content Marketing Action Items

»» Deliverable: A Content Marketing Plan

» UNDERSTAND THE BASIC CONTENT STRUCTURE OF SOCIAL MEDIA

Social media has a structure. Your content is like *water* that is *poured* into the *structure* of social media. Structure influences content. Thus, the first key to success with content is to understand the basic structure of social media:

1. **Users, Superfans, Influencers, Content Creators, and Brands produce content**. Content can be texts, photos, or videos. A wide range of individuals, from everyday people to content creators to the brands themselves, create and upload various types of content (videos, photos, images, text posts, etc.) to their accounts.
2. **Users are connected to other users and brands**. Users "follow" brands or "like" other users, content creators, etc.
3. **Users see and consume content when connections post it**. As friends, influencers, superfans, content creators, and brands post content, users connected to them see or consume this content.
4. **AI recommendation engines reward engagement**. The AI-based algorithm of each platform monitors content that receives engagement, as measured by watch time (for videos), likes, comments, and shares. AI then pushes engaging content out further: thus, "content that gets engagement" gets even more "engagement" via the AI algorithm!

As content producers, we thus face a **structural reality**. We must get users to "follow" our brands on social media. And we must encourage users to watch, like, comment, and share our content piece by piece.

With the rise of **AI recommendation engines** - that is, algorithms that monitor what users view, like, comment, and share - users who like "cats" see more "cat videos," and users who like dogs see more "dog videos," and so on and so forth. This "rabbit hole effect" on social media has critical implications for your content strategy:

» BRAINSTORM ENGAGING CONTENT

The trend is obvious. *Engagement*, rather than *social connection*, is driving social media content. TikTok was the first platform to be truly a "recommendation engine" first and

a "social platform" second. Previously, platforms like Facebook, LinkedIn, and X put the primary weight on who a user followed.

> *Social connections* among users and brands used to be the key aspect of the content algorithm. The trend, with the rise of AI recommendation engines, is that *engagement* drives the success or failure of content, especially video.

TikTok is the best example of how engagement drives content promotion. The algorithm monitors users in the background, tracking not only their interactions, such as likes, comments, and shares, but also their **hover time** and **watch time**. Suppose a user hovers over a video and/or watches it to completion. In that case, the algorithm determines what the video is about and recommends similar content to that user, regardless of whether they are **connected to other users or not**.

Dog lovers see more dog videos. Cat lovers see more cat videos, and iguana lovers see more iguana videos. **And they see these videos not just from connected friends and brands but also from non-connected brands.**

> TikTok pushes content from "**strangers**" to viewers as much, or more, as it does from "friends" to "friends."

On TikTok, it doesn't really matter who you follow. **What type of content keeps you engaged matters.**

The other platforms, especially YouTube and Instagram, are following TikTok's lead. They are beginning to prioritize engagement and "suggest" content from users that a person does not yet follow, i.e., "strangers." This is increasingly true even for Facebook, the dodgy old dweeb of social media.

The rise of AI has enormous implications for your content strategy. First and foremost, **you must create engaging content.** Content that gets likes, comments, and shares – yes, but also content that spurs users to dwell on it, to consume it entirely. Second, you must create content that spurs "hover time" and "watch time." And third, this means you are marketing as much to *strangers* as to your brand's fans or superfans.

This means:

#1 – Grow your follows, likes, comments, and shares. Yes, you still want customers to follow your brand on social media and "smash that like button" on Facebook, Instagram, YouTube, and other platforms.

#2 – Grab their attention. "Dog bites man" is not news. "Man bites dog," however, is news. Shocking! Outrageous! Over-the-top! That kind of headline, thumbnail, and first few seconds of content is what snags users' attention (both followers and strangers). We increasingly live in a "clickbait" world.

#3 – Foster engagement. Increasingly, however, you must create content that spurs engagement as measured not just by likes, comments, or shares but also by hover time and watch time (on video). Once you have their attention, follow up with fun, helpful, "sticky" content that encourages them to stick around and subscribe.

#4 – Think about strangers. How does your content appear to a person who has never seen your brand? How can you convert this stranger into a prospect, customer, superfan, or even brand evangelist?

In summary, there is now both a *social connection* and a *recommendation engine* aspect to success in social media. The strongest social media content is viral in nature by being "emotional" or "over-the-top" AND is pushed by users to other users through shares AND is pushed by the algorithm to other users by virtue of its strong engagement.

» IDENTIFY CONTENT YOU CAN EASILY PRODUCE

Let's leave aside the user-generated content problem and focus first on content that you and your team can produce. Look around your company as if you were a journalist, photojournalist, or videographer. What content opportunities exist in text, photo, or video format? What content might be easy to produce and engaging?

Let's look at REI (**https://www.rei.com/**) as an example of one of our "companies to emulate." 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 **https://www.rei.com/blog**.

- **Motivating customers to create content**. 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. Check out the REI hashtag *#optoutside* on X and Instagram. You can view it on X at **https://jmlinks.com/52w** and on Instagram at **https://jmlinks.com/52x**.

To see more of REI's content in action (posts, blog posts, videos, images), simply browse the company's Facebook Page at **https://www.facebook.com/REI/** and admire the remarkable content marketing machine of this online retailer.

You, Too, Can Create Content

REI's content marketing machine may seem formidable, and it is. REI is a massive corporation in an entertaining and photogenic industry with many passionate outdoor enthusiasts acting like fans. REI has tremendous advantages. But guess what? You, too, can create great content for your own social media marketing machine.

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.

Let's return to some of the other companies-to-emulate. Revisit Rustic Cuff, for example, at **https://www.rusticcuff.com/,** and look specifically at their content marketing. Check out their social media profiles on Instagram, Facebook, Pinterest, and YouTube. Each social channel is amazing! You can also check out Numi Organic Tea at **https://numitea.com/** and follow them on social channels like Instagram or Facebook. Or, if you think social media is only for B2C (Business-to-Consumer) businesses, check out B2B (Business-to-Business) ThermoFisher Scientific at **https://www.thermofisher.com/**.

With active channels on YouTube, X, Facebook, and LinkedIn, each company shows you that businesses - small and large, consumer and B2B - have all plunged into social media and can (and are) succeeding. It takes effort, and the organic tea niche differs from the custom bracelet niche. In contrast, the B2B niche of selling high-tech gadgets is distinct from the niche related to your business's products and services. Identify, research, and dominate your niche even as you look to best-in-class companies like

Rustic Cuff, REI, Thermo Fisher, Numi Organic Tea, or others that are great to *emulate* but should not *intimidate* you for your future success as a social media marketing maven.

Remember: you (and your company) are experts in something (hopefully, your products or services, or at least something related to your products or services). You (and your company) are 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, your Android phone to take videos, and some nifty online tools to create cheesy quotes about it, post about it, create infographics about it, etc., etc.

> **AI PROMPT.** Explain to ChatGPT the concept of being a "helpful expert" in your industry, with the background of your Business Value Proposition and target Buyer Personas. Then prompt it as follows: "Given what you know about our business and buyer personas, give me ten ideas of short videos that position our company as a fun, helpful expert."

Being a "helpful" (or "cool," "engaging," "fun," "witty…") "expert" for your buyer personas is the essence of content marketing.

Your first **TO-DO** 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 an 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. 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 a video? Can you write?

Use AI to Brainstorm Content

Here, AI can accelerate your content creation process. Fire up ChatGPT, explain what your company does (your **BVP**), who your target customers are (your **Buyer Personas**), and what kinds of content you believe your target customers want to consume (your **Content Themes**). Ask it to brainstorm twenty easy ideas for videos, five great themes for blog posts, ten teaser YouTube videos to promote your upcoming webinar and so on and so forth. Moving beyond brainstorming, you can ask it to create a script for your YouTube video or an outline for your blog post. AI video tools are

rapidly emerging that can convert text into video. You can even use AI tools to edit content, especially video.

As an example, I told ChatGPT it worked for *Jason's Cat Boarding Emporium*, a premium cat boarder in San Francisco that focused on a) daycare for San Francisco cats, b) long-term boarding solutions for the cats of San Franciscans going out of town, and c) our e-commerce store selling premium cat toys and jewelry. Then I asked it for five easy content ideas for short videos for Instagram Reels and TikTok. Here are its suggestions.

1. **Cat Cameos**: "A Day in the Life" - Film short clips of a cat enjoying a day at the Emporium—playing with toys, lounging in comfy spots, interacting with staff, or exploring the daycare area.
2. **Customer Testimonial + Cat Action** - Record a short, casual clip of a customer explaining why they love your services, while their cat is doing something adorable in the background (such as playing, purring, or exploring).
3. **Cat Challenges or Trends** - Hop on viral TikTok challenges or trending sounds, but adapt them for cats. For instance, try a "What the Fluff?" challenge (where you disappear behind a blanket and the cat reacts) or engage in the classic laser-pointer chase to trending audio.
4. **Behind-the-Scenes Fun** - Film staff setting up a room for a new guest, playing with a cat, or recording a quick "meet the team" video where each staff member introduces themselves while holding a cat.
5. **Cat Reactions to Premium Toys** - Record short clips of cats playing with your e-commerce products, like a fancy toy or piece of cat jewelry.

ChatGPT can give you easy ideas for creating video content. Involve it in every stage of the content production process, from idea generation to outlines and scripts, to actual content production, and even to editing. Just don't be lazy and use it without supervision!

WORK THE PARTY

The point of this exercise is to get you to think about what type of content you can easily and systematically feed your social media channels. What are you good at? Which opportunities are easy? You need a lot of content, and thus, you are looking for easy-

to-create, high-impact content opportunities, ideally video, but if not video, then photos or text.

» IDENTIFY CONTENT FORMATS

What kind of content do people generally want? What type 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 X.

Memes. From *Grumpy Cat to Success Kid, memes create* content that is fun, memorable, sticky, and shareable on social media. I love memes; do it yourself - go to Google, type in "social media memes," and click on "images" to get a quick laugh.

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, meaningful, moving, informative quotations. Cute and clever quips on industry events. Even within the 280-character limit of X, you can share ideas that are short, sweet, and powerful.

Slideshows. From Slideshare to just posting your PowerPoints online, slideshows 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 other networks, such as Instagram, TikTok, and Facebook.

These are just the *formats* of content, the *genres* of information, as it were. They're just empty shells. Your job is to identify which formats will be the easiest for you and your company to produce and then start your content production machine. We'll return to them in a moment, but for now: a) understand that content "lives" in various formats such as text, photos, or video, b) start to think about which formats are going to be easiest for you to produce, and c) which formats are most likely to spur engagement from your target customers.

» IDENTIFY BUYER PERSONAS AND KEYWORD THEMES

Your second **TO-DO** is to brainstorm the **buyer personas** and **keyword themes** that customers care about, as well as the type of content that they will find interesting and engaging. These are interrelated, just as the foods that guests want and the types of guests are. Kids like French fries and Coca-Cola; adults like fine French wines and camembert cheese. Well, I personally prefer French fries and Coca-Cola, but I'm a kid at heart.

Build a Content Theme Worksheet

While **keywords** do not play as tight a role in social media marketing as they do in search engine optimization (SEO) or Google Ads, you still want to identify customer social media 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, and 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. Focus here specifically on the "content" and not the "products or services" that they might like.

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, as well as time-sensitive.
>
> **The Office Manager**. She works in a nearby office and is charged with ordering 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." So, you'd need to generate either coupon codes or perhaps short posts 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 X.

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 content interests. HubSpot produces a nifty buyer persona tool at **https://jmlinks.com/29s**. Answer a few questions, and the tool will literally create a buyer persona profile, complete with a 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, such as a photo, a blog post, a post, or a video.

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

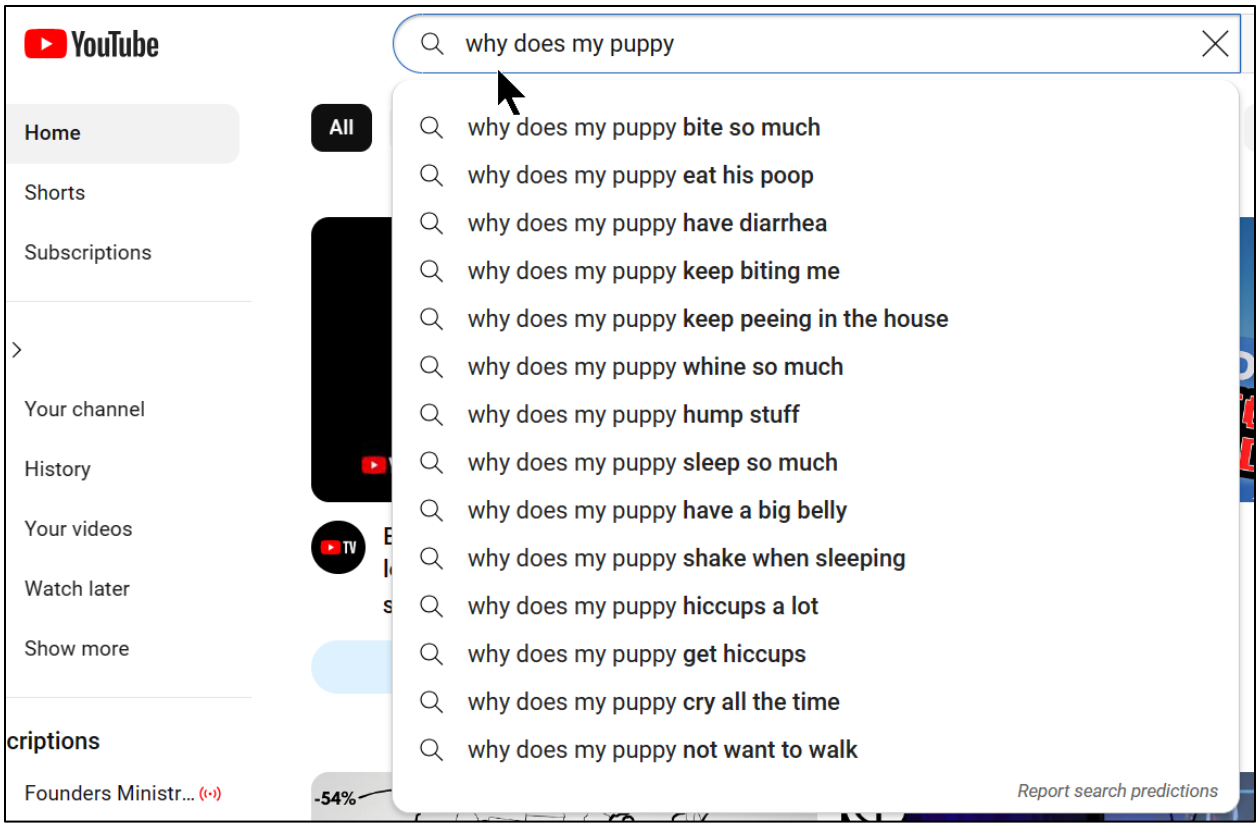
SeedKeywords (**https://www.seedkeywords.com/**). Type in a scenario, and this tool generates a URL you can email out to your team members. Then, each can input the keyword themes that they think the "buyer persona" might be interested in.

RiteTag (**https://ritetag.com/**). Again, input a "starter" word or hashtag, and this tool will show you related hashtags and metrics on popularity (shown visually by keyword size). It's based on X but is really useful for any theme.

Answer the Public (https://answerthepublic.com/). Enter some "seed keywords" that you think your target customers might talk about on social media. Browse suggestions. "Answer the Public" is a fantastic tool for brainstorming keywords and one of my favorites!

Google AdWords Keyword Planner. If you have a Google Ads account, and especially if you're spending a couple of hundred dollars per month, you can use this Google tool to research keywords, related keywords, volumes, and value. The reality is that what people search for on Google is often also what they talk about or find engaging on social media. To access it, visit Google Ads at **https://ads.google.com/**, log in, then click on the "tools" icon at the top right, and then click on "Keyword Planner."

Another easy tactic is to go to Google or YouTube and just type in a "seed keyword." Here's a screenshot from YouTube for the "starter phrase" "Why does my puppy:"



As you research keywords, look for themes that connect "what your customers want" with "what you offer." These are your primary themes, that is, themes that directly or

very closely relate to what you offer. An example would be a Palo Alto pizza restaurant that features themes such as "pizza" or "Italian food."

Don't miss **adjacent keyword themes**. A Palo Alto Pizza Restaurant, for example, should realize that its customers will also be talking about and interested in content themes such as "places to eat in Palo Alto," "where to take a client to lunch," "things to do in Palo Alto, etc." Even themes like "birthdays" or "Memorial Day" would be relevant themes. 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 its social media keyword themes aren't just "airlines" or "cheap air tickets," but also themes such as travel, best tourist destinations in Mexico, Latin America, and things to do in Mexico City, among others.

Use AI to Identify Content Themes

Feed ChatGPT a buyer persona and ask it to create a list of the types of content that the user would be most interested in consuming. For example, for *Jason's Cat Boarding Emporium*, I asked it to create a list of five photo types that a Buyer Persona of a wealthy San Francisco tech executive who has two cats whom he adores and travels frequently to New York City might be interested in, to improve our brand recognition and stay top-of-mind when he's looking for a cat boarding company for his frequent NYC trips. Here are the first two ideas it gave me:

1. **Luxury Cat Suites Showcase** - A well-composed photo of a cozy, luxurious cat boarding suite, complete with plush bedding, toys, and a cat lounging contentedly. Add a caption like, "Where your cats vacation while you conquer NYC."
2. **Travel & Cat Care Comparison** - A split-screen image: one side showing a polished executive boarding a plane, the other showing his cats being pampered at Jason's Cat Boarding Emporium. Caption: "While you're in NYC, they're living their best life in SF."

And here is what it provided when I asked for five content themes that might interest this Buyer Persona.

1. **Luxury and Comfort** – Showcase how your boarding services offer the ultimate in comfort, with photos of premium bedding, toys, and custom spaces designed to make cats feel pampered and relaxed.
2. **Trust and Peace of Mind** – Highlight the attentive care your staff provides with images of staff interacting lovingly with the cats, ensuring they're happy and well-tended to while their owner is away.
3. **Effortless Travel Solutions** – Create visuals that illustrate how easy it is to drop off and pick up cats, emphasizing convenience for busy professionals on tight schedules.
4. **Healthy and Happy Cats** – Feature vibrant, active cats playing with toys, lounging peacefully, or enjoying nutritious treats to communicate the high-quality care and attention their pets will receive.
5. **San Francisco Sophistication** – Incorporate the local vibe with images that blend your services with iconic San Francisco backdrops, appealing to the urban pride and lifestyle of your target audience.

The interesting thing here is that AI gives you different content theme ideas than do the more research-based tools.

For your third **TO-DO**, download the **Keyword Worksheet** and the **Content Marketing worksheet**. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), 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 formats that are easy for you to produce and then look for opportunities. You're looking to marry "content that's easy to produce" with "content that your customers want." Create a **content calendar** that includes not just dates and topics but also key themes and content opportunities that exist at your business.

Here are some content ideas using the idea of a Palo Alto pizza restaurant:

- **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 on the company's 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*).

- **Incentives**. Many restaurants already offer a complimentary dessert to customers celebrating their birthday, such as an ice cream sundae or brownie. Ensure that your restaurant provides an incentive for customers celebrating a birthday to identify themselves. For example, "Check in on Facebook" and be entered to win a free pizza on your birthday! Coupons, special deals, discounts – these are all types of content that you can and should produce for social media.

- **Photo or Quick Video**. Take a photo or shoot a quick video. 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 lookout for other customer photo opportunities such as anniversaries, holidays like Valentine's Day or Cinco De Mayo, gatherings of friends, or even that group of business customers on a quick lunch.

- **Contests and Challenges**. For Cinco de Mayo, have a **contest** for the person who can eat the most chips and guacamole. Or create a contest for the best guacamole recipe. **Challenge** your customer to see who can flip the lid of a burrito bowl without spilling. Chipotle, for example, is a brand that crushes it in terms of contests and challenges. Check out their "Chipotle Lid Flip" challenge at **https://jmlinks.com/57a** or via the hashtag #*Chipotlelidflip* on Instagram and TikTok.

- **Reminders**. If possible, obtain the email addresses of one or all customers, or place paper notices in your business that include the following message: "Check our Facebook Page and Instagram Page" for our birthday photos and birthday photo contest. Your email newsletter is a form of content marketing; don't neglect it.

- **Promotions**. Paid advertising is a type of content. Smart social media marketers increasingly don't ignore advertising, but rather integrate their ads with their organic content (and vice versa). In fact, where advertising ends and organic begins is a fuzzy line nowadays.

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.

The Written Word

While content is heavily moving towards video, don't forget the written word. You have both posts and blog content that is text-based. You'll also need a lot of written content for your social media posts. Using our example of a Palo Alto pizzeria, 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 her to discover your pizza restaurant and get in the rotation for caterers. She's probably looking for blog articles on human resources, catering, employee morale, and 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 the writing task of creating 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 X 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 post/photo with a discount code or hashtag, such as *#PaloAltoPizza25,* that customers only need to mention upon ordering to receive the discount. Or perhaps you realize that *#tacotuesday* is a trending hashtag on X every Tuesday, so your content production task is to piggyback on the buzz about *#tacotuesday* by having a taco-style pizza ready every Tuesday. You then post a short message with a picture on Twitter and Instagram, using the relevant hashtags or keywords.

In each case, you identify a format of content (*photo*, *post, blog post*, *video*, or *post*) that aligns with the keyword themes your target customers care about. You then determine what content needs to be produced, who is responsible for creating it, and when it needs to be produced. Your **TO-DO**, here is to return to the **Content Marketing Worksheet** and populate the section on a Content Schedule. It should answer the following questions:

- What **content format** can be (easily) produced, such as photos, videos, blog posts, posts, etc.?
- What **keywords** or **content themes** does this content touch upon that matter to your target customers?
    - Don't miss **direct** themes (such as pizza or Italian food) vs. **indirect** themes (such as Irish-American holidays like St. Patrick's Day, what to do in Palo Alto, or even themes like how to cater for a great office party).

- **Who** is going to produce this content?
- **When** will they 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 be shared on Facebook, Instagram, your blog, X, YouTube, etc.?

Successful content marketing is about being **systematic**. It's about being **smart**. And it's about being **lazy**. Look for easy, ongoing content opportunities. At the end of this exercise, you should have a content calendar that guides the formats and themes of content you will either produce yourself, encourage employees to co-produce, or even incentivize customers to create around your brand.

» BLOG, BLOG, BLOG, YOU GOTTA BLOG, VLOG, PHLOG, AND POST

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 X, 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. **Blogs** are so crucial 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 re-optimize them as indicated below).

Your blog and its blog posts 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 Workbook, so we will not cover it here*).
3. as **content** for posting and **sharing** to your social media networks.

4. as a **place to put** other content such as videos or photos.

Conceptually, each of these is distinct, but a single blog post can be oriented towards one or all of them. For example, a blog post titled "Seven Tax Tips for Expatriates Living in the USA" can serve as a trust indicator, substantiating your CPA firm as experts in international tax issues. It can be an *SEO asset* that helps your company rise to the top of relevant Google searches, and it can also serve as *content* that you can share on social media networks like LinkedIn to stay top of mind among potential customers and encourage social sharing.

Repurposing Blog Content

Blog content can serve as one content format. But you can repurpose this content for other formats. What I mean is to take a theme and write a blog post about it. Then, "repurpose" your blog content into a photo plus a caption for Instagram, a short Reel or TikTok, or even a longer form YouTube video.

Let's say you're Thermo Fisher (one of our companies-to-emulate at **https://www.thermofisher.com/**). Your target buyers are scientists and engineers working in the biotech industry. Let's say you write a blog post on "Women and Science Careers: How to Encourage Young Women to Pursue Science." You might even use AI to help brainstorm and write the first draft of your blog post. You might research and pack it with facts and data. This gives you your blog post, which will be published on your website. But don't stop there. Next, you can break up that blog post into seven short posts for LinkedIn, each highlighting a significant point and referring to the blog post. Next, you can use ChatGPT to create short, two-minute video scripts for Reels. Finally, you can use the blog post as the foundation for a twenty-minute question-and-answer session with a top woman in your company about her experiences. Throughout this process, AI tools can help you take a content theme, build it into a foundational blog post, and then repurpose this content across formats, types, and platforms.

Fun tools that will help you "spin" blog topics and titles for social media are the Portent Idea Generator (**https://jmlinks.com/17g**) and Hubspot's topic generator (**https://jmlinks.com/9w**). AI, of course, has made it easier than ever to generate headline ideas, summary ideas, and rough drafts of potential blog content. Formulate some basic ideas and then prompt AI to help you draft out your written content.

> **AI PROMPT.** Explain to ChatGPT a basic blog idea. Using that prompt, then ask it to "spin" the prompt into a series of blog headlines and blog posts of about 500 words. Have a conversation to generate the blog ideas, give you the rough

draft, and even take existing materials and "repurpose" it into shorter posts, short videos, carousels of images, etc.

Be careful, however, to only use AI for the "rough draft." Google, as well as Facebook / Instagram / YouTube / LinkedIn, are all aware of the tsunami of low-quality content being created by AI. And they are beginning to penalize it vs. "human-generated" content. If you use AI, be sure to proofread it and run it through AI check software, such as Originality.AI (**https://originality.ai/**). Dumping low-quality images, video, or text is not a good content strategy.

Vlog, Phlog, and Post: Other Forms of Blogging

Blogging, of course, refers to the written word. A good blog post has a strong concept, a catchy headline, and somewhere between two and five paragraphs. Pretty much every business needs to have a blog unless your business is just so visual that you can get by with just photos or videos. You should expand your definition of blogging, however, to include other forms of rapid-fire content. Let's discuss each type:

Vlog or video blogging. You can blog with the printed word, but you can also "video" blog" or Vlog on YouTube and on native content on Facebook, Instagram, TikTok, and even LinkedIn. Indeed, with the rise of "stories" on Instagram and Snapchat, this is yet another type of "day in the life" video blogging. So think about short video content you can share across channels. Like blogging, this content can be very "spur of the moment."

Phlog or photo blogging. Photos are the bread and butter of Instagram and Facebook, so think of being systematic as you produce photos of products, services, customers, events, and so on.

Posting. You can post straight text on Facebook, X, or LinkedIn. These short posts (< 280 characters on X) are like microblog posts. Again, be systematic about the content that you'll share in text format. It can be as simple as posting "TGIF" on Friday, "I love Taco Tuesday!" or "The only thing we have to fear is fear itself," with some additional commentary about your industry or trends within it.

As with a more robust blog post, each type of "micro" blogging, such as "photo" blogging or "video" blogging, follows the same rules. Know what your audience wants, and create content that addresses your keyword themes. Think interactively – what will

your target customers like, comment on, or share? Give priority to emotions and counterintuitive content. Emotions work better than facts, and anything that's counterintuitive works better than things that are not. Brainstorm content that is "man bites dog," not "dog bites man."

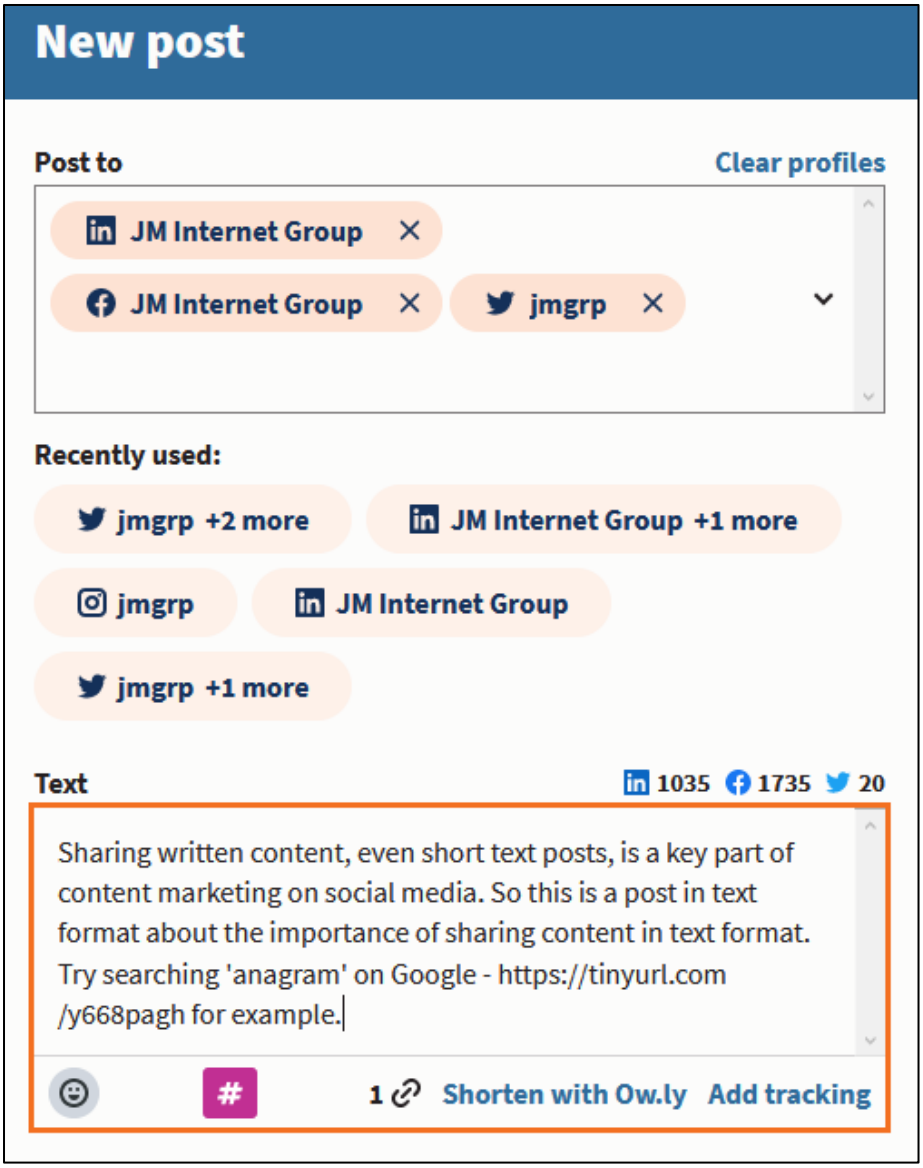
Think systematically. What can you produce easily and on schedule? It's easier if you think of content that's authentic and spontaneous vs. thinking that each piece of content needs to be a masterpiece that will stand for centuries.

Share Systematically on Schedule with Hootsuite

Finally, now that you have a well-written blog post (with photo, video, etc.) that addresses 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. Rebrandly (**https://www.rebrandly.com/**) is a service that allows you to use a custom URL.

Once you have a piece of content and a URL, shorten it and then paste it into Hootsuite (**https://jmlinks.com/29k**). Summarize the topic and post it strategically on your X, Facebook, LinkedIn, and wherever else is appropriate. (If you don't like Hootsuite, Buffer, or Later are alternatives).

Here's a screenshot of a post to LinkedIn, Facebook, and X via Hootsuite that is "just text:"



You can schedule your posts across time and platforms, thus making it very easy to "plan ahead" and populate your social channels for any given week or month.

To sum up, once you know a keyword theme, the process of creating a blog post (or another type of blog-like content) is as follows:

1. **Identify the blog concept and relevant content themes**. These define what the blog post is about and which keywords people are likely to search for.
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 royalty-free image site such as Pixabay (**https://pixabay.com/**) or Unsplash (**https://unsplash.com/**) and find an image that conveys the essence of your blog post. Experiment with AI-based image creation.
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!, Explore the latest scandal! Lose weight without exercise!, etc.* People react to and share content that resonates with them emotionally, and the headline is the first step toward evoking a strong emotional response.
5. **Finalize the content**. Review your content to ensure it is easy to read, using lists and bullet points where possible.
6. **Share the content**. Identify the appropriate social media platform, such as LinkedIn, X, Facebook, Instagram, etc., and share your post. Use a tool like Hootsuite to organize and schedule your social media posts.

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 serve as a trust indicator, be beneficial for SEO, and be attractive for social media sharing, or all three! So, start blogging, vlogging, phlogging, and sharing short posts!

» CURATE OTHER PEOPLE'S CONTENT

Effective social media content can be categorized into four main types: your own content, other people's content, user-generated content, and interactive content. We've already discussed your own content, such as text, blog posts, photos, or videos, that you will conceptualize and create regularly. But because you'll need a lot of content to feed your social media channels, you will generally never be able to generate enough on your own. For this reason, let's turn to the second type of content – **other people's content**, often called "**curated 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 post, and sharing this content on your social networks, such as X, Facebook, LinkedIn, etc. I, for one, do a lot of content curation on X and LinkedIn. You can check me out on X at **https://jmlinks.com/37m**. Here's a screenshot of me sharing informative content on the importance of blogging:

By diligently paying attention to blogs, publications, and trade shows on SEO, Social Media Marketing, and Google Ads (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 (X, LinkedIn, Instagram, 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

The concept of a "helpful expert" is a useful way to grasp content curation. You'll position your lead employees and/or your company as "helpful experts" by sifting through the low-quality content in your industry, identifying the best / most useful content from industry blogs, gurus, and publications, and then sharing this content on your own social media channels. If producing your own content is all about being a skilled photographer, writer, or videographer, content curation is about being a skilled *editor*.

The steps to content curation are:

1. Identify your **content themes** (which you have hopefully already identified above), including broader industry themes. Using tools like Google News, Feedly, or simply monitoring industry blogs and social accounts, follow these themes to establish an inbound stream of suggested content.
2. Systematically **research and identify content**. Browse industry blogs, portals, websites, social media feeds, etc.. Separate the wheat from the chaff, meaning distinguishing between high-quality and low-quality content, and identifying truly interesting content that will resonate with your target customers.
3. **Summarize** this content in a concise format, ideally less than 280 characters, including a short URL to the full content using a URL shortener like bit.ly or tinyurl.com.
4. **Share** this content to your social media channels regularly, using scheduling software like Hootsuite (**https://jmlinks.com/29k**) or Buffer (**https://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 undoubtedly 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 easily accessible, while the advantage of your own content is that it's yours; you can customize it to convey 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 the disadvantage (if they're good) is that 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 excelling in social media (e.g., Whole Foods, REI, HP, Bishop Robert Barron, Seth Godin). 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("OPC") is easy to find and share and helps to position you as the person or company that really has its ear to the industry pulse.

How do you find quality content produced by other people? How do you do this easily and systematically?

Fortunately, there are tools to help you systematically identify and share other people's content. (All are listed in *The Marketing Almanac*, *content marketing section* and on 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, such as on Facebook, LinkedIn, and X. You can share their content with your followers, plus comment on content that they're producing. To find blogs, go to Google and type in a keyword that is relevant to your company's industry and the word "blog." For example, visit **https://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 posts and articles on your keyword themes for sharing. See it in action for "organic food" at **https://jmlinks.com/37n**. You can input these "saved searches" to your Start.me page as well.

Google News. Google News is one of the best free tools for aggregating information. Log in to your Google / Gmail account and visit **https://news.google.com/**. Once you do so, you'll get an email alert when Google finds new news, and this content will appear in Google News on the left under "saved searches." You can also manage your feed by clicking on "For you" on the left and adding keywords or topics.

DrumUp (https://drumup.io/). DrumUp integrates seamlessly with most social media platforms, helping you curate and share content that is useful to your followers.

Feedly (**http://feedly.com**) - Feedly is a newsreader integrated with Google or Facebook login. 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 create infographics for your blog easily. A competitor is Piktochart (**http://piktochart.com**).

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. It's useful, but I like Google News better at **https://news.google.com/**. Identify topics to follow, including searches.

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 engaging content, summarizing it, and sharing it to your social media networks by scheduling it to Hootsuite. *We're talking about the systematic production of content marketing, factory-style.* By being systematic, you can fill your social media content pipeline in just a couple of hours a week.

> "I want to be a machine." ~ the artist, Andy Warhol

Keep Your Secrets Secret

And, as part of the social media illusion, you don't have to share the excellent tools above with your customers. They'll think you are amazingly awesome. The "illusion" of effective social media marketing will work in your favor; you will be perceived as the industry guru who somehow never sleeps and is aware of every critical industry trend, "how to" video on YouTube, and key article that's up for debate in the industry blogosphere.

» ENCOURAGE USER GENERATED CONTENT (UGC)

Never forget the *social* element of social media. Don't think of this as a project you'll complete by yourself; you need employees in your company to help, as well as the participation of your customers and fans. You'll want to enlist the support of other employees in your company, especially frontline, customer-facing staff, to identify content opportunities. If 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**. 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 generic "Happy Mother's Day" photo on Facebook; instead, post a photo of a real (customer) mom and child and ask users to share their favorite memories of their own (real) mothers.
>
> **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. Want to

see what contests are up and out on Instagram? Check out the hashtag #*contest* at **https://jmlinks.com/52y**.

Sponsor Challenges. Especially on youth-oriented platforms like Instagram, YouTube, and TikTok, brands can create silly challenges that motivate customers and superfans to chime in. For example, check out the "#challenge" hashtag on TikTok or Instagram. It's full of brand-sponsored "challenges" that encourage UGC.

Conduct Surveys. Utilize your blog, X, or Facebook to conduct customer surveys. X, for example, has made the app easy to use; select the "Add Poll" icon on a Tweet. For Facebook, merely Google "Facebook Poll App," and you'll find an assortment of free and paid apps for Facebook. SurveyMonkey and Google also offer free / paid versions of survey software.

Use Hashtags. Especially on Instagram, TikTok, and X, you can set up a branded hashtag just so your customers can share posts about your products or services. Airbnb does this on Instagram with #*airbnb* (**https://jmlinks.com/29p**), as do vendors like REI with #*optoutside* (**https://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, posts, 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* (**https://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.

Influencer marketing is yet another buzzword for UGC. It has come to mean paid or at least promoted content. So, for influencer marketing, you:

1. Identify influencers who reach the types of customers you want to reach.
2. Reach out to them via email, their agents, or emerging marketplaces such as Collabstr (**https://collabstr.com/**). Most influencers require at least a free product, if not a paid promotion fee.
3. The influencer then shares content about your product or service with their social following. It could be a product review, a coupon or special deal, a contest, or something else.

UGC is all about encouraging customers, fans, superfans, and even (paid) influencers to talk about and "spontaneously" share content that casts your product or service in a positive light on their social channels. Your **TO-DO** 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?

» INTERACT WITH INTERACTIVE CONTENT

Finally, as you are working on your own content, curated content, and UGC, don't forget that social media is really all about interactivity. The fourth type of content is "**interactive content**," a term that describes the back-and-forth between a brand and its customers, or among customers themselves. All of the algorithms favor content that engages people as measured by likes, comments, and shares. A YouTube video that "goes viral" usually does so because people like it, comment on it, and share it. The same applies to a Facebook post that gains a lot of traction or a post that appears prominently on X. As you create content, curate content, or catalyze UGC, always think:

1. **What's in it for them?** Why would a user even want to passively read or consume this piece of content in the first place?
2. **Why would they like it?** What will cause them to hit the "like" button, and why?
3. **Why would they comment on it?** What prompt can you devise that will engage them in a conversation around this piece of content?
4. **Why will they share it?** Content that gets shared extends your reach, and saying that something "went viral" really means that people engaged with it so fervently that they massively liked, commented on, and shared it. But why?

Next, flip this around and realize that you, as a content producer and brand, need to interact with the content of others. If someone comments on your YouTube video, respond to their comment. Do the same if someone comments on your Facebook or LinkedIn post, tweet, or other social media posts. If someone reviews you on Yelp, respond to the review and express your gratitude. If they engage with you, respond in kind. Have conversations with your fans and superfans across all channels.

Be Interactive. Set a goal of logging in to each of your social channels daily or weekly. Scan for user comments and comment back. Thank people for reviews on Facebook, Google, or Yelp. "Tag" people in photos on Instagram or Facebook. Follow the followers of your competitors. Reach out to influencers, superfans, and prominent people on X and talk "to" them about your keyword themes. Be interactive with people who have commented on your content; be proactive in interacting with new people, especially on platforms like X or LinkedIn, where it's considered acceptable for individuals to initiate online conversations with strangers.

Use AI for Interactivity

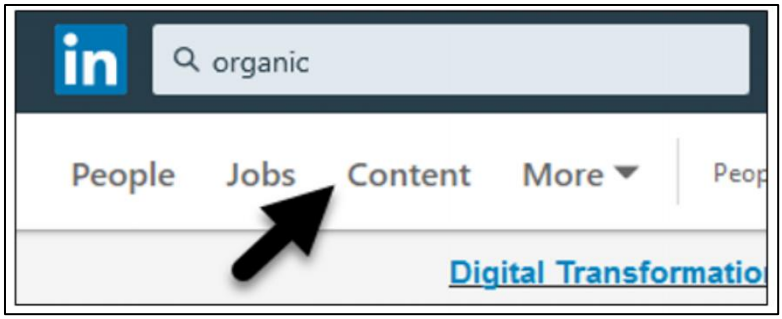
Throughout the content marketing process, you can use AI. For example, take a blog article and copy/paste it into ChatGPT, then ask it to summarize the reaction into a 280-character Tweet. Or paste comments to your own content into ChatGPT and ask it to formulate short, one-sentence responses. Give ChatGPT some guidance as to your brand voice and use it to "respond" to content posted by users. AI can accelerate your ability to interact with user content!

Look for Content and Engage with It

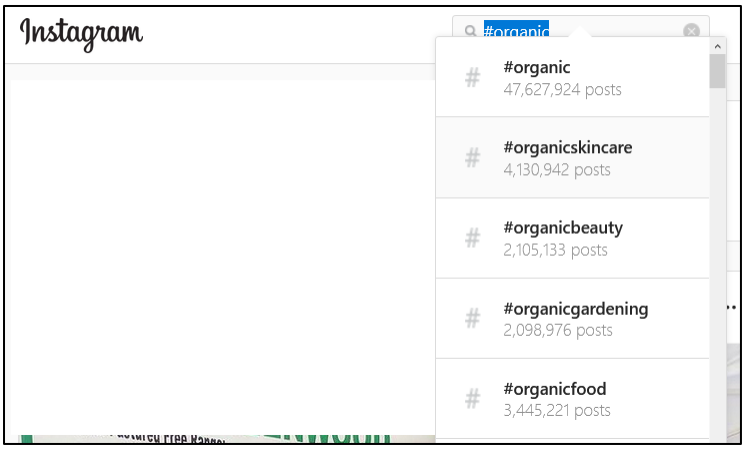
Moreover, look for content by your users, potential users, and by influencers. Find their content and engage with it by liking, commenting on, and sharing it. Here's just one example based on LinkedIn.

1. Sign in to your LinkedIn account.
2. In the search bar, type in a keyword theme that matters to your company and/or customers.
3. Click the button marked content.
4. Scroll through content posted by others to LinkedIn and like, comment on, and share content that's relevant to you and your brand.

Here's a screenshot:



Do the same with hashtags across Facebook, LinkedIn, X, and Instagram. Identify key hashtags and engage with the content being shared across them. Here's a screenshot for the hashtag *#organic* on Instagram at 47 million posts:



(Hashtags will be explained in our Chapter on X, but for now, think of a hashtag as a content theme. The hashtag *#dogs* on X, Instagram, and TikTok pulls together the online conversations around "dogs," for example. In this way, across all networks, you can quickly identify content posted by others on themes that matter to your business. You can then like, comment on, and share that content. Indeed, people respond to the "flattery" that you took the time to read, like, comment on, and even share their content.

It's not just LinkedIn or Instagram, of course. You can do the same process on all the networks. Find posts on Facebook that matter to your brand and comment on them, find posts on X that matter to your brand and like or comment on them, find videos on YouTube that matter to your brand, and thumb up / thumb down, comment on, and share them. Interactive content means making this process of searching for and engaging with others a key part of your content marketing strategy.

INTERACTIVITY IS WHERE "IT'S AT" ON SOCIAL MEDIA

Interactivity can be as simple as following, liking, commenting on, and sharing the content of other brands or individuals in your industry. It can also be as complicated as identifying "influencers" who are more powerful than you and systematically drawing them into a conversation or interaction. By engaging with this content, you'll draw the attention of others and become part of the conversation. No one likes people who just talk. Any good conversation is about talking and listening, listening and reacting, sharing and bringing others into it. Social media, in summary, is a *conversational* platform, not a *broadcast* medium.

The latest trend is towards "duets" and "commentary" on both TikTok and YouTube. On TikTok, a "duet" refers to a feature where one user comments on another user's video. "Duets" can even go viral on X. You can check out "duets" on TikTok at **https://jmlinks.com/57c**. TikTok also features numerous commentary videos. This is similar to YouTube, where content is often tagged as "commentary," which usually means one user clips a video from another user and then comments on it in video format. However, similar to a duet on TikTok, a YouTube user "comments" on another person's YouTube video in an interactive video conversation. On YouTube, the slang term for these videos is "reaction" videos.

» CARROT & OUTREACH MARKETING

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." And you've realized that the backbreaking work will be creating the kind of **content** that makes potential customers want to "like you," keep coming back for more, and share your message with their friends, family, and/or business colleagues.

> **Content creation** and **promotion** are the most crucial ongoing tasks in successful social media marketing.

With that in mind, I would like to draw your attention to a high-value type of content marketing. It's what I call "**carrot and outreach**." In this strategy, you identify something "free," such as a Webinar, an e-book, a free online consultation, or some other type of content that is not only free to the user but so enticing that they will give

you their name, company name, email, and telephone. *Your* "free carrot" is given in exchange for *their* contact info so that you or your sales team can follow up.

Here's an example:

1. You are a B2B company selling something professional, such as anti-virus and anti-phishing software, to companies concerned about online security.
2. You create a free Webinar that is short, informative, and fun, entitled "The Unseen Dangers of Managing Your Business Online." This webinar highlights the issues around viruses, phishing, and other scams that plague corporate users on the Internet.
3. You promote your free webinar via teasers, paid ads, and short clips, using both paid and free tactics on key social networks, such as X, Facebook, and LinkedIn.
4. Interested people register for your webinar.
5. You produce the webinar as a "Facebook / LinkedIn / X live event" and record it so you can repurpose that content later.
6. You capture the names, company names, email addresses, and phone numbers of the attendees.
7. Your sales staff follows up with these prospects and makes sales.

"Carrot and outreach" marketing is used most frequently in B2B and professional services. But it can also be used in B2C marketing. For example, a dog groomer might offer a free online consultation on dog beauty issues. Or a tax preparation service might provide a free financial analysis. An e-commerce company might offer a heavily discounted or free sample in exchange for signing up for its lowest price offering. The sky is the limit: identify "free" content, a promotion or outreach strategy to promote it, and your follow-up strategy.

Email marketing (discussed in Chapter 12) is ideal for "carrot and outreach." For example, you can brainstorm an exciting, fun, "must-read" email newsletter. The newsletter in and of itself can be your "carrot." Or you might identify an eBook. Alternatively, think of using a DRIP campaign, which is a series of automated email responses that go out before or after your "anchor" "carrot" content. If you have something free and can capture their email address, you can then create a drip campaign. Learn more about DRIP campaigns at **https://jmlinks.com/57g**.

»» CHECKLIST: CONTENT MARKETING ACTION ITEMS

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

❑ Identify **buyer personas** and **keywords** or **content 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 and companies-to-emulate** using online tools to identify the *most shared content* and reverse engineer why. Brainstorm how you can also create highly interactive or shareable content.

❑ Identify the **four types of content**: your own content, other people's content, UGC (User Generated Content), and interactive content. What will be your easiest and most effective mix of content?

❑ Create a **content map** for your own content to be produced. These might include simple text, photos, videos, memes, infographics, and more. Pay attention to **content format** and identify which format is easiest for you to produce.

❑ Use **ChatGPT and other AI tools** to brainstorm content (posts, photos, videos), create first drafts, and perhaps even edit your own content, especially video. AI should not be used without supervision, but AI can speed up your content production process.

❑ Set up **tools** like Google News, Feedly, DrumUp or monitoring industry blogs to pre-identify the content of others. Sort through the noise and identify content that positions your brand as a "helpful expert."

❑ Brainstorm **UGC content opportunities** and, if possible, set up the "systems" to begin encouraging UGC. Consider creating contests or challenges that spur your customers to "spontaneously" share content.

❑ Set aside a specific time each day or week to identify and interact with **interactive content**, whether as posted by customers or fans to your own brand channels or by customers or fans across hashtags and relevant content themes.

❑ Create a **content calendar** identifying the type of content you will produce, when it will be made, and who will produce it.

❑Systematically share your content using a scheduling tool such as Hootsuite or Buffer.

❑ Brainstorm a free "**carrot**" such as an eBook, Webinar, or free consultation, and then use "carrot" and "outreach" marketing to connect social media to your sales funnel. Consider using a **DRIP** campaign via email.

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

»» DELIVERABLE: A CONTENT MARKETING PLAN

Now that we've come to the end of Chapter 3, your **DELIVERABLE** has arrived. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), and click on the link to the "Content Marketing Worksheet." By filling out this plan, you and your team will create a comprehensive strategy for all the engaging content, both yours and that of others, that you'll need to fill your social media pipeline.

ROUTE
66

4
FACEBOOK (ORGANIC)

Facebook is a great place to begin your Social Media Marketing journey! Here are five good reasons.

First, Facebook is – by far – the **largest social media platform**, with over three billion active users on all Meta platforms, and countless individual profiles, business pages, and groups. Survey after survey, Facebook has been ranked as the most used social media platform.

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, X, or Instagram.

Third, the Facebook **algorithm** now heavily rewards posts that foster engagement – that is, watch time (for videos), as well as likes, comments, and shares for all posts. This aspect of "rewarding engagement" is increasingly common not just to the Facebook algorithm, but to all platforms – including X, LinkedIn, YouTube, Pinterest, TikTok, and others. Mastering the art of engagement on Facebook will help you excel in content marketing across all platforms.

Fourth, due to its extensive reach and nuanced targeting options, Facebook is an exceptional **advertising** platform. Throw in the fact that Facebook owns Instagram, and Facebook advertising options are second to none in social media!

Fifth and finally, Facebook is **fun**! Social media marketing should not be viewed as a chore, but rather as a means to connect with your customers and build a tribe of evangelists around your company, product, or service.

The question is not whether your customers are on Facebook but rather what they are doing and how you can brainstorm a social media strategy to reach them.

Let's get started!

TO-DO LIST:

- » Come to Terms with Facebook's Disorganization
- » Explore how Facebook Works
- » Inventory Companies on Facebook
- » Understand the Facebook Algorithm
- » Set up and Optimize Your Facebook Page
- » Tools to Manage Your Facebook Business Page
- » Brainstorm and Execute a Posting Strategy
- » Promote Your Facebook Page and Posts for Free
- » Work with "Superfans" on Facebook
- » Nurture Facebook Groups
- » Odds & Ends: Events, Facebook Live, etc.
- »» Checklist: Facebook (Organic) Action Items
- »» Deliverable: a Facebook (Organic) Marketing Plan

» COME TO TERMS WITH FACEBOOK'S DISORGANIZATION

Before we dive into Facebook, we need to address the elephant in the room: Facebook's disorganization. Everyone who uses META (i.e., Facebook, Instagram, Messenger) as a marketer sooner or later becomes frustrated with its complex and inconsistent systems and its haphazard enforcement of rules (if you even know what the rules are). Getting banned from META is practically a badge of honor among marketers, and yet no one really knows what gets an account banned vs. what does not. The credit card management system is a disaster, and none of the products, such as Ads Manager, Business Manager, or Pages, play nicely with each other.

Amidst all this is Wunderkind founder Mark Zuckerberg. In my humble opinion, he could use some adult supervision. For example, in October 2021, the accidental billionaire rebranded the company as "Meta" and fully committed to the "Metaverse." The "Metaverse" is a geeky, nerd space in which we are all supposed to don virtual reality "headsets" and "interact" with each other in this new computer-simulated reality. Allegedly, we'll all love this. We'll all buy NFTs (non-fungible tokens), conduct meetings, and be thrilled about the "Metaverse," leading to the abandonment of real interaction in the real world. (To visit Meta's information site on business in the Metaverse, visit **https://jmlinks.com/58v** or visit the Meta homepage at **https://www.meta.com/**).

By now, it's clear that the metaverse has been born prematurely, if it will ever really succeed. Zuckerberg is now on to the AI trend. You can check out Meta's AI efforts at **https://www.meta.ai/**. Meta is significantly behind OpenAI, Microsoft, and Google.

As we explore Facebook, try to focus on what you're trying to accomplish rather than the latest hype: using Facebook to reach prospects, customers, and superfans in a way that helps "build your brand" and "sell more stuff." There is a key difference between the massively successful platforms (Facebook and Instagram) and Wunderkind Zuckerberg's latest obsessions (the Metaverse and now AI).

» 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, step back and ponder what real people are doing on Facebook. People primarily use Facebook to share posts, pictures, and videos of their friends and family, as well as (to a lesser extent) to interact with groups they care about and (to an even lesser extent) to engage with brands. For now, log on to Facebook and observe the "party" and what people are doing at it. This is an important point for all social platforms:

> Before you attempt to use a platform as a *marketer*, experience it as a *user*. What are "real people" doing on this platform? What content types and content themes are creating engagement? Don't bully your way into a platform and just start shouting. Listen first. Then participate.

I'm assuming you have a personal Facebook profile; *if you do not,* simply go to **https://www.facebook.com/,** or download the mobile app for your phone, and sign up. Check out Facebook help 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**.

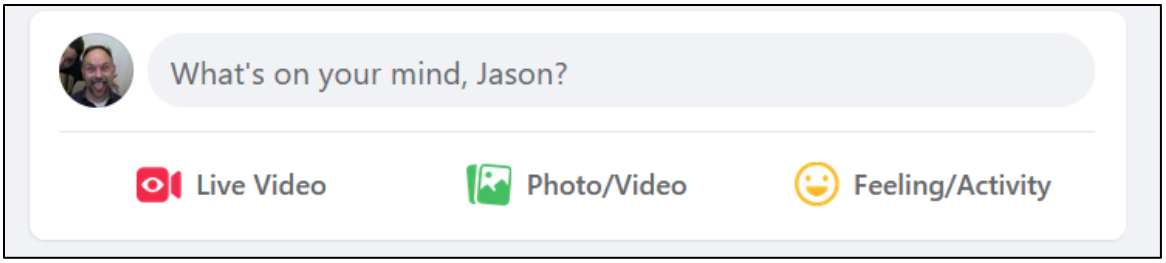
If you're new to Facebook, make a list of your friends and family, including, if possible, their email addresses. Log on to Facebook and search for them by name. Send out "friend requests" and monitor "friend requests" that are coming to you as well. Grow your network of friends on Facebook if you haven't already. Note that Facebook, unlike LinkedIn, Instagram, X, TikTok, YouTube, or Pinterest, requires users to "be friends" for the interactive magic to occur. If you have an established Facebook account, you likely already know this.

Next, start posting photos of your family, your dog, your trip to Las Vegas, or whatever to your "timeline." When you log in to Facebook on your desktop or your phone, look at your "feed." (Note this was initially called "news feed," but was renamed in 2022 to "feed." People use both terms interchangeably.) Your *feed* will display the posts of friends and family with whom you are connected; when they post to their timeline, it will appear in your *feed* (with some caveats about the *Facebook algorithm*; more about this later). Similarly, when you post to your timeline, those posts will appear on the feed of your friends when they log into Facebook, whether on their computers or phones.

The timeline and feed are interrelated symbiotically. For example:

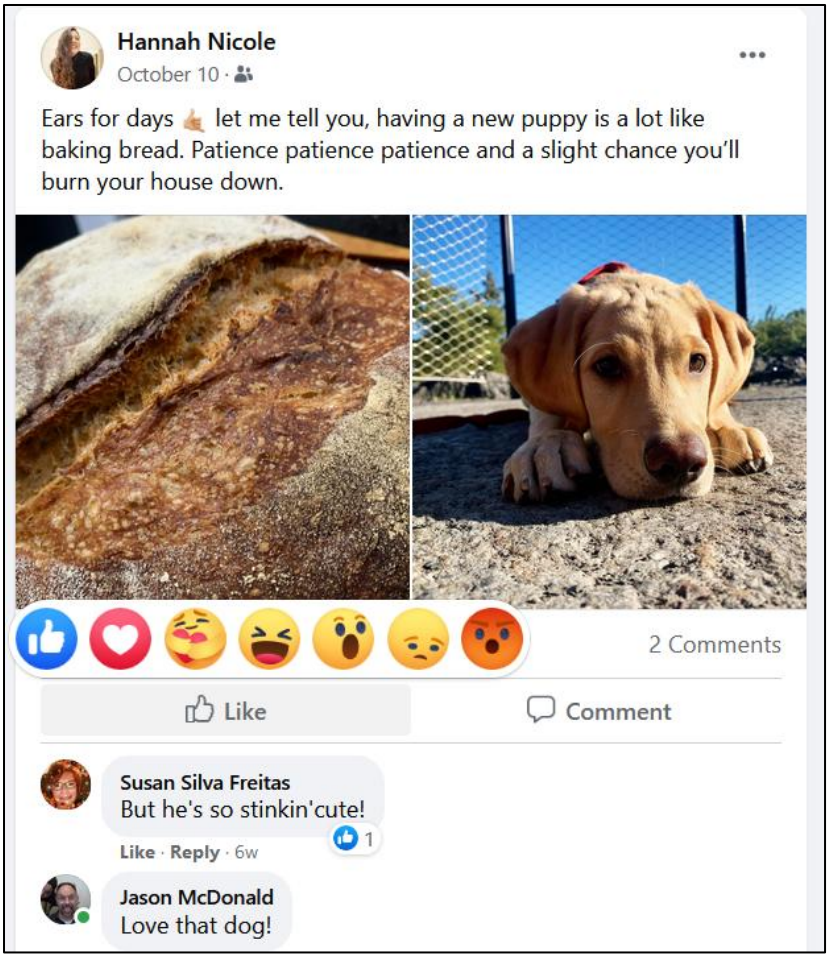
> My daughter Hannah and I are **friends** on Facebook. One of us has proactively accepted the other's "friend request."
>
> Hannah **posts** a picture of something she finds interesting to her Facebook **timeline**.
>
> I see that picture when I log in to my Facebook **feed**.

Here's a screenshot of my timeline, where I can share a status update with text and/or photos or videos with my friends:



If I post something to my *timeline*, it has a robust chance of appearing on Hannah's *feed*. I post, and she sees it because we are "friends," i.e., connected on Facebook.

The reverse is true as well. Here's a post by Hannah about her new puppy, Levi, that appeared in my feed:



Notice how I have commented on the post, "Love that dog," as has our mutual friend, Susan. Thus:

> Posts to *my timeline* show up in Hannah's *feed*.
>
> Posts by Hannah on her timeline appear in my *feed*.

The core idea of all social platforms is this relationship: what you post to your "timeline" can appear in the "news feed" of people connected to you (and vice versa). This is the basic idea of traditional social media networks (at least until TikTok). (Post TikTok, the algorithms increasingly prioritize *content* over *connections* – dog people see more dog content, cat people see more cat content, etc.).

Note the role of Susan as well. Posting doesn't happen only between two people but "among" people. I am connected to Hannah. She is connected to me. We are both connected to Susan. Hannah posts, I post, Susan comments, Susan posts, Hannah

comments, I "like it," and so on. More significantly, this can occur not just among individuals but also between individuals and brands. Hannah posts, I post, and Whole Foods posts. We can all "see" each other's content and like, comment, or share it.

Another key element on Facebook (and universal to all platforms) is "tagging." If I am "tagged" by the *@JasonMcDonald* sign in a post, then that post has a good chance of showing not only in my own feed but also the feed of people connected to me. Here's a screenshot of a post by me, "tagging" my Dad *@JosephMcDonald*, and thus showing in my timeline, his feed, and possibly the feeds of people connected to BOTH my dad and me as well as people ONLY connected to my Dad:

Let's jump a little ahead. You create a Facebook Page for your business. You create a piece of content, such as a photo of your staff at a product launch with some superfan customers. You "tag" your customers in that post by mentioning their names with the "@" sign – thus helping the post to show not only in your brand's Facebook Page but also the feeds of the "tagged" customers and even possibly the feeds of their friends and family. This small technical act of "tagging" is a subtle yet important way to enhance the organic reach of your posts. Learn more about "tagging" people on Facebook at **https://jmlinks.com/76u**.

Posts, Timelines, and Feeds

When I post to my timeline, therefore, a post has the chance to be shown in the feed of *everyone* with whom I am friends on Facebook; when *any* "Facebook friend" posts content to their timeline, that post has an opportunity to appear on my feed. And vice versa, all day long, 24/7, until the end of time.

Here are the important takeaways:

1. **The Feed is Dominant.** Few people, if any, go from the feed and click over to business pages or even friends' profile pages. It's all about posts to the timeline and the readership that lives on the feed. The feed is "where it's at." Indeed, most people access Facebook on their phones, rather than on their computers. On mobile phones, Facebook is even more "all about" the feed.
2. **The Phone is Dominant**. Facebook is converging with other platforms, as the phone is by far the dominant access device. Focus on how your content appears in the feed and on mobile devices, not on your Page or desktop.
3. **Content**. You need a lot of content to succeed at marketing on Facebook! The feed is like a swift river of content, so you, as a marketer, must frequently post to have a chance of being noticed. You'll need text, images, and video to succeed at content marketing on Facebook. This is true for ALL platforms – it's all about content marketing and showing in the feed.
4. **Your Facebook Business Page isn't That Important.** While it is important to optimize your business Page on Facebook, few customers will proactively visit your Page directly. *Most will only see your posts in their feed.* So, spend most of your time and effort on where the action is: getting posts to appear in the news feeds of your customers and target customers.

5. **Engagement is King.** The AI "recommendation engine" is replacing friends and family connections as the key factor to who sees what content. Therefore, you MUST create **engaging** content to be successful. Boring "buy my stuff" content won't work. Content that is counterintuitive, emotional, fun, engaging, and over-the-top, "you gotta see this" – is king, queen, and jack on Facebook.

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

As you begin to examine Facebook from a marketer's perspective, pay attention to what people are sharing and engaging with. You will 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 simply as plain text, Facebook is a platform where people share information about their friends and family. Notice how many likes, comments, and shares fun photos of friends and family garner on Facebook. Facebook is a giant, collective social scrapbook.
- **What I'm Doing Today.** Alongside photos and texts of friends, family, and fun, people share text, photos, and even videos of what they're doing today. Posts of the peach cobbler they just made, their beautiful garden tomatoes, or perhaps their dog doing a weird trick – these "here's my life" type of fun photos are a huge theme in Facebook content as well.
- **Photos.** Photos dominate Facebook! Photos of friends at the beach, at Disneyland, High School graduations, Bar Mitzvahs, and new babies. People are constantly posting photos with short commentaries, generally about friends, family, and fun.
- **Video content**, while less common on Facebook than on Instagram or TikTok, is even more engaging. *Facebook Live* enables users to stream content in real-time. *Facebook stories* also emphasize photo and video content.
- **Fake.** As we will discuss in more detail in a moment, Facebook culture is often perceived as "fake." People share the happy and successful moments of their lives but not so much the sad and unsuccessful events. Facebook is how we project our lives as we wish them to be, not 100% as they truly are. This is even more true for Instagram.

- **Politics and Outrage.** Yes, sadly, there are political folks on Facebook, and they have their place. Political news, conversation, and outrage have their place on Facebook, although many people dislike politics on the platform and respond negatively, if at all. Fortunately, political and outrage content on Facebook is actually in decline.

And –

- **Games, Social Contests, Challenges.** For some people, Facebook is a place for social games. Contests and often silly "challenges" are put out by brands and can "go viral" as more and more people enter a contest or challenge. **Groups** are a big content opportunity on the platform.
- **Groups**. Groups are a BIG opportunity on Facebook! Dog lovers join dog groups, cat lovers join cat groups, and people from Nevada form groups for those who grew up in Nevada. Even better, people who love a brand or product join groups around their favorite brands. For example, the "Instant Pot Community" (which focuses on how to cook using the Instant Pot) has over 3.2 million users – people passionate about a product sharing tips, tricks, hacks, and recipes. Check it out at **https://jmlinks.com/76v**.
- **Marketplace**. Facebook Marketplace is one of the platform's most popular features. It's a sort of a 24/7 flea market where people post local items for sale. It's sort of like classified ads or Craigslist, and for many people, it's a primary reason to have a Facebook account. It may not be directly relevant to your business, but it feeds into why Facebook is such a powerful advertising platform: nearly everyone is on it in some way, shape, or form.
- **News & Commentary.** Increasingly, Facebook is becoming a significant source of news. Thus, people log in and see news posts (often by the media, frequently shared by friends) and "like," "comment," or "share" these news items. Please note that news is primarily displayed on the app, rather than on the desktop version.

Here's a theme we will see even more prominently on Instagram, but exists on Facebook: narcissism. Look at me! Look at my awesome (consumer) life! We live in the age of the selfie, and people love to share content that positions themselves as AWESOME.

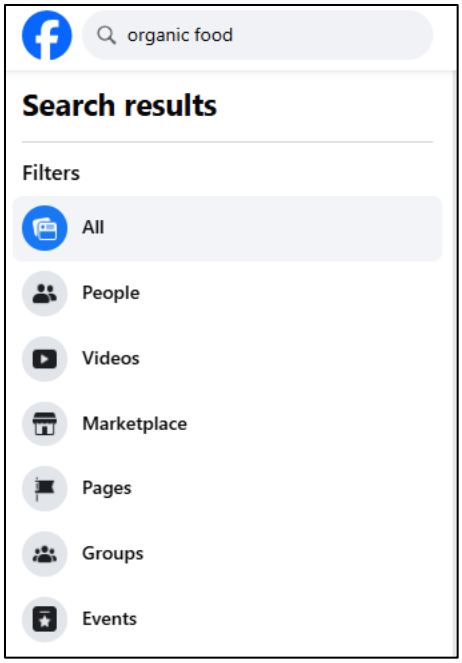
Look at our happy family at Disneyland! Look at me and my date at the Cheesecake Factory! Wow, look at these cool photos of me when I went skydiving in Peru over Machu Picchu with my girlfriend and pet cat, and took a selfie to memorialize it, so you can (enviously) see how incredible my life is.

Facebook, you see, is full of **fake**, of how life ought to be or at least of how life might be if everyone were really as "into" everyone else's narcissistic lifestyle as it might seem. To listen to an informative podcast on how the "fake" of Facebook can impact your own psychology, check out **https://jmlinks.com/29v**. Be that as it may, your brand's Facebook content must align with the culture, which is centered on friends, family, fun, photos, and authenticity.

Searching Facebook for Content

Return to your content marketing plan and get out your content themes. Research whether people are posting and talking about your themes on Facebook. If so, fantastic. If not your primary themes, perhaps there are adjacent ones next to what your company sells or does. You're looking for content and conversations that either directly or indirectly relate to your brand.

To search Facebook, log in to Facebook and look for the search bar at the top. (Note: I'll generally use the desktop version of the platform for examples). You'll see *Search Facebook* in gray text. (Note: for purposes of simplicity, we'll use the desktop version of Facebook, though most users use the mobile version). Enter a keyword such as "organic food." Here's a screenshot:



Next, scroll down the column that pops up. You can search Facebook by keyword for:

All – search everything.

People – these are people who have this keyword in their bio and/or posts.

Videos – these are videos posted to Facebook on the keyword.

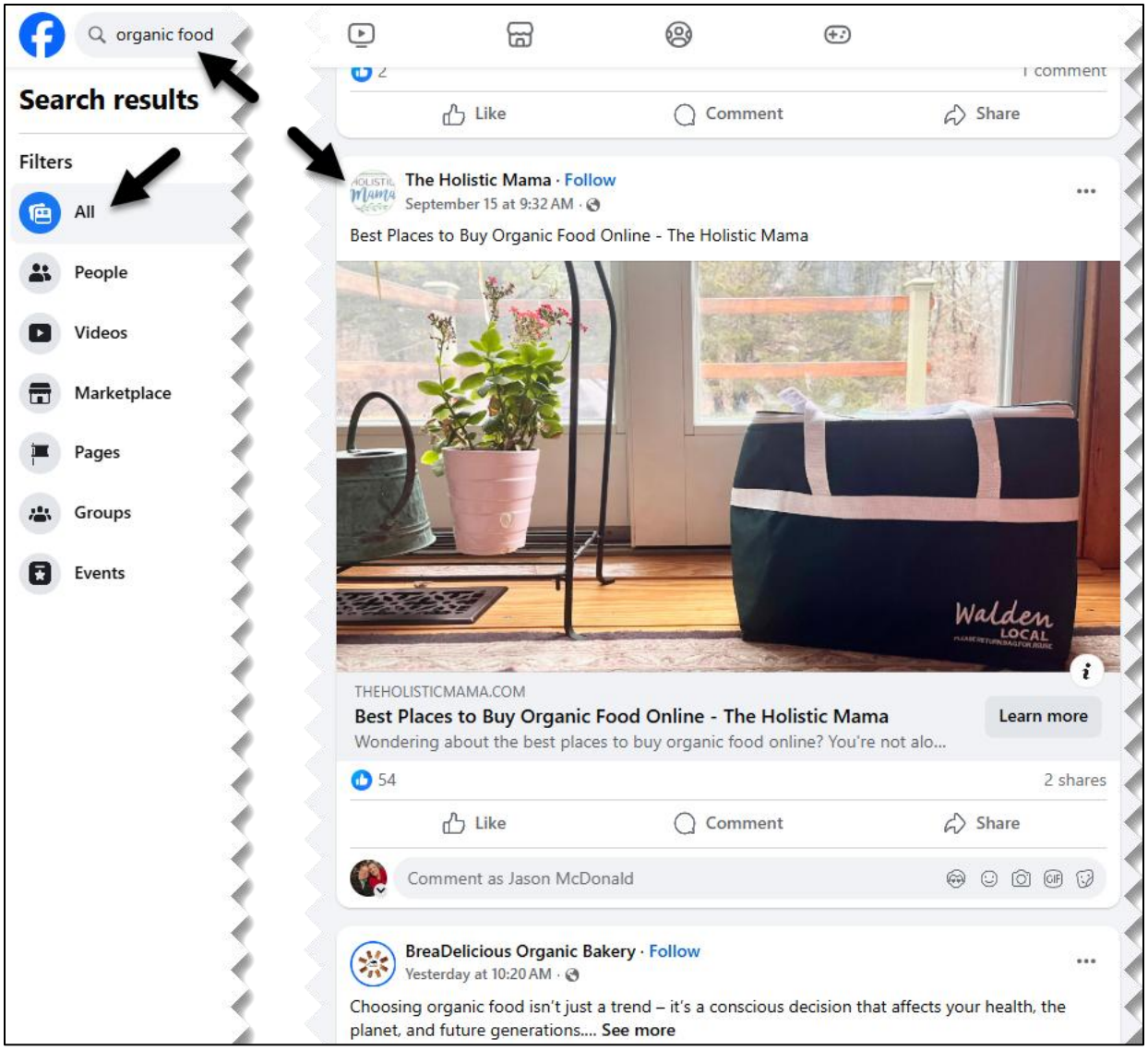
Marketplace – these are things being bought and sold via Facebook.

Pages – these are business pages that have the keyword in their bio and/or posts.

Groups – These are Facebook groups that relate to a keyword.

Events – these are events being discussed on Facebook related to this keyword.

Let's focus on the default, or "All," setting. Take your target keywords, such as "organic food" or "golf," and search for it on Facebook. You'll see Pages, Groups, and Posts in the results. Here's a screenshot for the search for "organic food"



As you scroll through the posts, look for:

Pages. Look for competitors or companies-to-emulate that post on your keyword themes. You want to "follow" them so you can monitor what content they post (and how successful it is in terms of likes, comments, and shares).

Posts. Look for posts by actual people. What do actual people like to post, comment, like, and share about? The more your own content fits with the vibe, the better it will do.

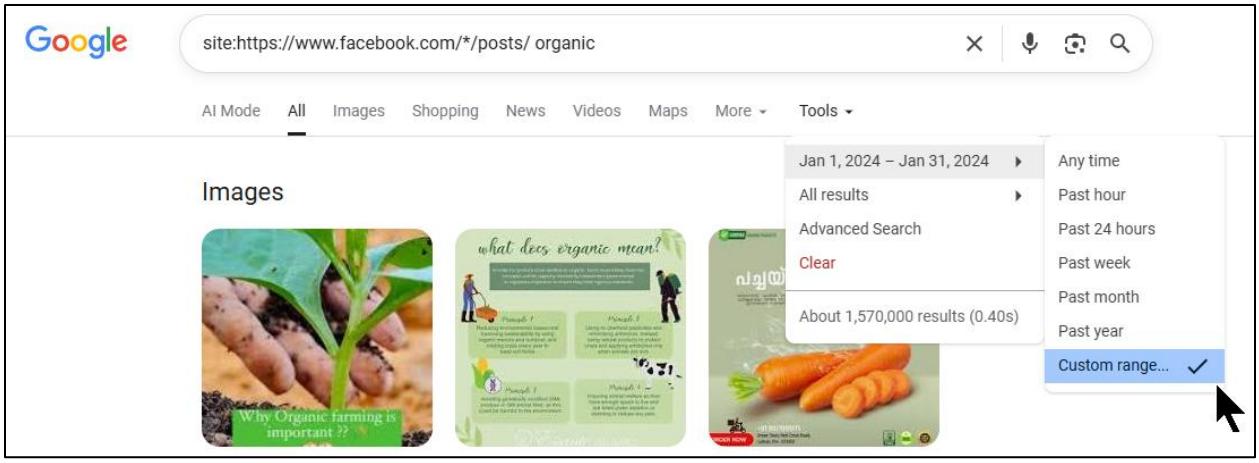
Groups. Look for groups that are on or near your target keywords. Join relevant groups and listen in.

As of this writing, Facebook has removed the ability to search for posts in a more sophisticated fashion. Here, you can use a special syntax on Google to search Facebook as follows. Go to Google and type in:

site:facebook.com organic food to search Google for Facebook posts on organic food.

site:https://www.facebook.com//posts/ organic food* to search Facebook for posts on *organic food*. Note, you must use the "*" character. If you want to search for a specific brand, enter the brand handle there, for example, using the *site:https://www.facebook.com/IowaFarmBabe/posts/*, organic search to find that specific brand's Page.

If you want to search for a specific time period, you can use the tools menu on Google and the special syntax above. Here's a screenshot for a Google search for Facebook posts containing organic in 2024:

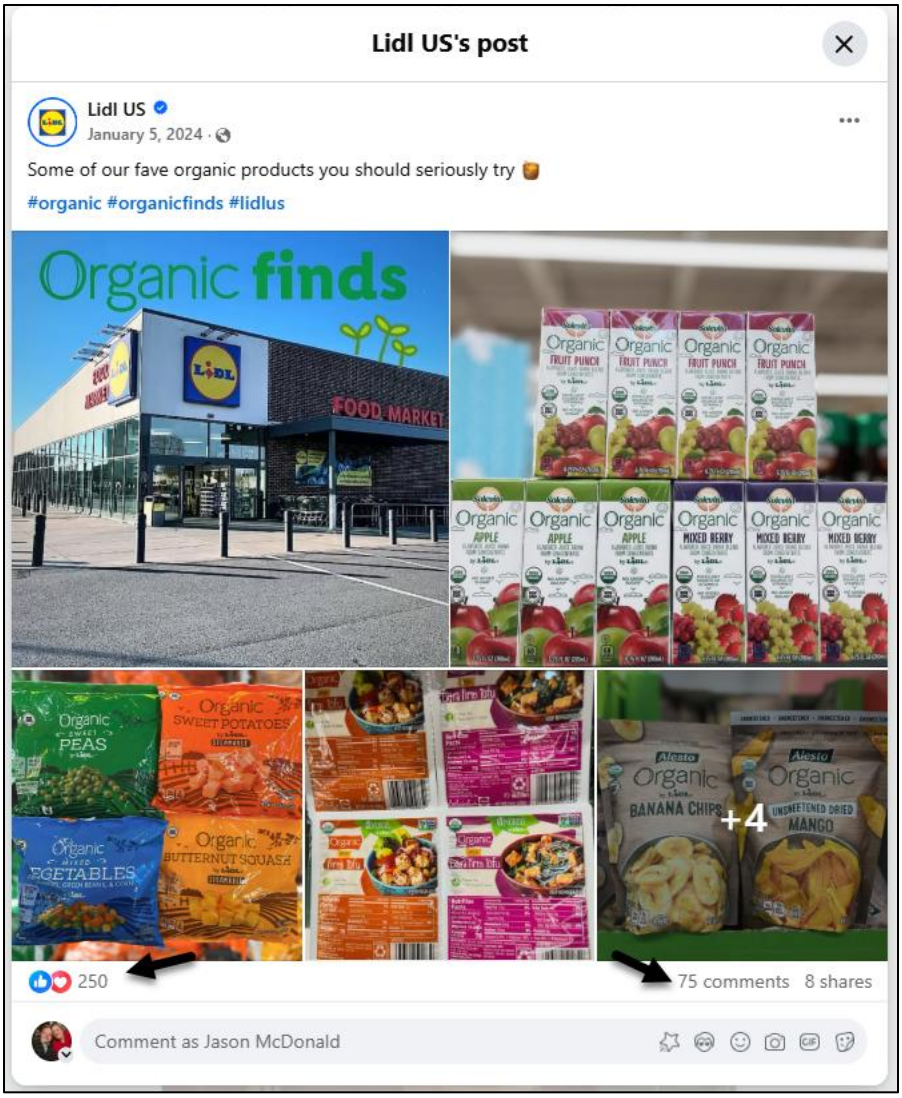


Note, you must enter it exactly like this on Google for this to work:

site:https://www.facebook.com//posts/ organic*

Replace "organic" with your own keywords. In this way, you can use Google as a search engine to penetrate Facebook. You're looking for posts, Pages, Groups, videos, etc., that have been posted to Facebook and have done well as measured by likes, comments,

and shares. For any specific post, look to the bottom for likes, comments, and shares. Here's a screenshot:



Remember that there are two possibilities: content themes that are *directly* relevant to your business versus themes that are *adjacent* to your business. You're looking for both types of content themes – *direct* or *indirect/adjacent*. Why? Because there's no point in posting content that people aren't already interested in and engaging with on Facebook.

> Your goal here is to use **content themes** to figure out whether customers are engaging with topics of interest to your brand on Facebook, and if so, how.

You're also looking to identify company Pages and groups that are relevant to your business.

To understand the difference between *direct* and *adjacent* themes, consider airlines on Facebook. Air travel is anything but fun. Passengers are stuck in cramped quarters with total strangers, fed peanuts and soft drinks, suffer through terrible WiFi, and are subject to TSA searches and endless flight delays. I don't know of many people, even those who fly first class, who genuinely love air travel itself. But the *destinations* are another story. Who doesn't want to go to Cancun or Paris? Who isn't interested in visiting the Pyramids or Beijing? So, in terms of keyword themes possible on Facebook, we have:

direct themes:

air travel

airlines

airfares

SouthWest Airlines ("brands")

vs.

adjacent themes:

Cancun

Beijing

The Pyramids

You can see right away that the *direct* keyword themes don't really fit Facebook's culture of friends, family, and fun, but the *adjacent* or *secondary* keyword themes do. A little research will confirm this; try entering a few of the keywords listed above into the Facebook search bar. Which topics are getting more posts, and which topics are getting more interaction as measured in likes, comments, and shares?

This insight means that if you're an airline, you can't really share content that *directly* relates to your product or service because it's not very fun or pleasant. However, you can also share content that's related to your product or service, such as the destinations to which you fly or the great people who are your employees and customers.

For example, check out this post by Aeromexico on its Facebook Page:

The post highlights the adjacent theme of "Dia de Muertos" (Day of the Dead), Mexico's rich culture, and the enjoyment of a destination journey during this holiday. It doesn't emphasize crowded flights, airport delays, lousy food, and obnoxious fellow travelers. It's the *adjacent,* not the *direct*, content theme that fits Facebook's culture.

IDENTIFY DIRECT AND ADJACENT CONTENT THEMES

Returning to your own business, research the keyword themes that are *directly* related to your business vs. those that are *adjacent* to your business. Start asking yourself, "What themes are my customers posting about on Facebook?" and "How could our company participate in this conversation in a meaningful way that also showcases our brand?" You'll see a lot of posts by businesses on Facebook, but pay attention to the likes, comments, and shares of individual posts to gauge whether real customers are genuinely engaged in this conversation. So, your questions are:

1. Are customers posting on keyword themes that matter to your business, either *directly* or *indirectly* (*adjacently*)?
2. Are these themes getting a lot of interaction as measured by likes, comments, and shares?
3. How can you (as the marketer) create or nurture content that will interact with customer-based content yet be authentic and non-salesy?
4. Will your content focus on directly relevant themes, adjacent themes, or perhaps both?

Are You a Fun Company or Not Fun Company?

At an abstract level, 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 or photos of your product or service directly. (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 outside the box about content creation for Facebook. (Example: Geico Insurance at **https://www.facebook.com/geico,** 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. Perhaps LinkedIn or X will work better for your brand; if so, the point of your research on Facebook is to eliminate it as a target for content marketing. Not every platform suits the needs of every business.

As you build out your Facebook content and posting strategy, dig into what brands are doing as opposed to individuals:

- 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, and you shouldn't copy it*).
- What are companies-to-emulate doing, and what is working for them? Why or why not?

At this point, don't worry about the technical details. Spend some time researching customers and brands. Figure out the basic Zeitgeist for Facebook as it may relate to your own marketing goals.

> **AI PROMPT.** Copy/paste content from your competitor's Facebook Page into ChatGPT. Prompt ChatGPT to analyze the content strategy and even to do a SWOT analysis (strengths, weaknesses, opportunities, and threats) of the competitor content analysis. Copy/paste your own content and ask for a comparison of "missed opportunities."

» INVENTORY COMPANIES ON FACEBOOK

Make a list of companies (both competitors and companies-to-emulate) that you admire on Facebook. You want to monitor them and reverse engineer what they're doing that's working.

> *Imitation is often considered the highest form of flattery, and identifying successful brands to reverse engineer is a straightforward way to master marketing on Facebook.*

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

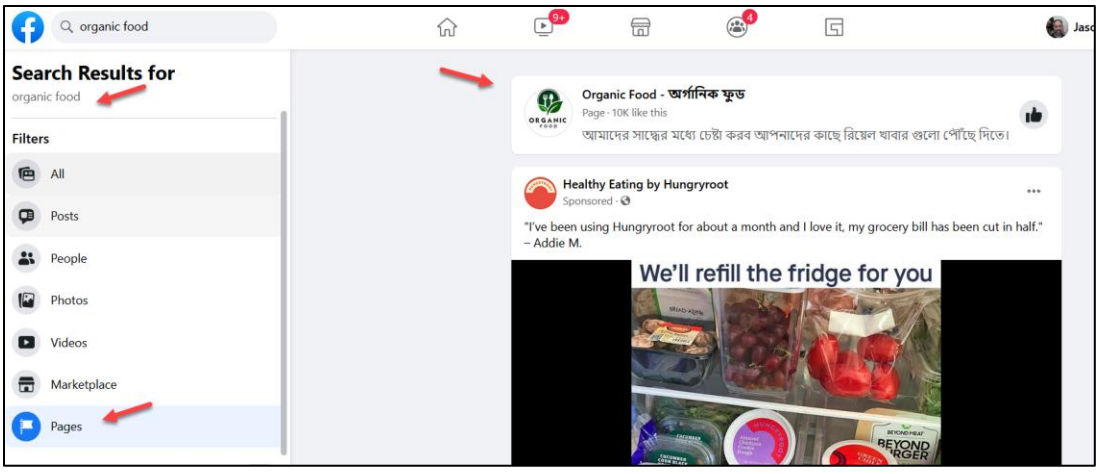
Ways to Search Facebook for Inspiration

First, return to the **content 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 posting strategy above all else.

Your **TO-DOS** 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.

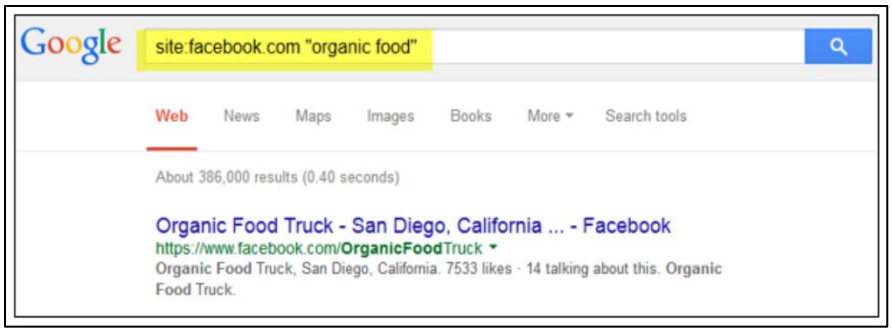
Returning to the first step, here are the two best ways to find commercial Pages to inventory for your Facebook marketing plan.

Method #1 - Search Facebook Directly. Type your keyword into the search box, as in "organic food." Next, at the top tab, click on "Pages." Here is a screenshot:



After you click "Pages," you'll be able to browse business Pages that relate to your keyword search. Next, click into Pages, looking to 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 in terms of their Facebook strategy.

Method #2 - Identify Facebook Pages via Google Search. Go to Google. 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 a list of commercial Pages on Facebook that contain that term. To see this in action, go to **https://jmlinks.com/2i**. Here's a screenshot:



There must 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, 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 platform to find relevant companies to reverse engineer.

Method #3 – Visit websites and look for social icons. If you have a handy list of your competitors and companies-to-emulate, another easy way is to visit their websites, scroll to the bottom (or look at the top right), and find the "social media icons." This is also a great way to find their Facebook, Instagram, TikTok, and other social media platforms all at once. For example, at the bottom of **https://www.geico.com/**, you can see icons and links to all of Geico's social accounts:

I recommend building a spreadsheet or Google sheet with each of your competitors and companies to emulate, including quick links to their social platforms, starting with Facebook.

IDENTIFY COMPANIES THAT DO FACEBOOK WELL AND INVENTORY THEM

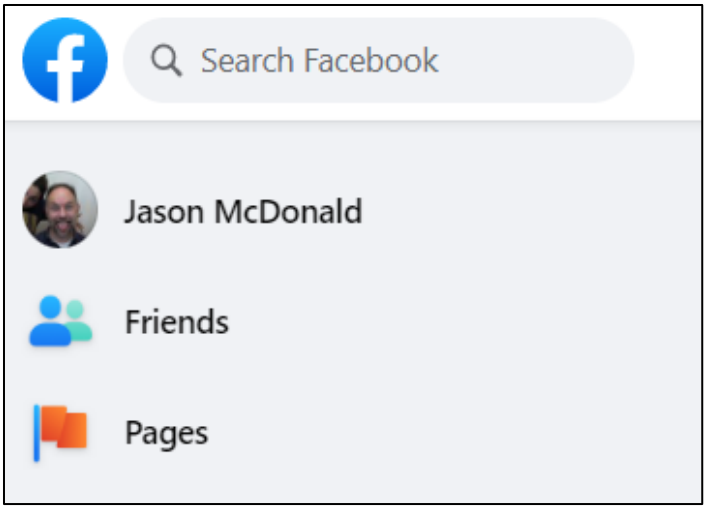
Don't be afraid to "like" companies on Facebook (even your competitors) in your individual account. In fact, I strongly encourage it. By "liking" companies you actually "like," you'll experience how they market to you, and you can then reverse engineer this for your own company.

At this point, you should have a vibrant personal *profile* on Facebook (connected to many friends and family members), some business *pages* to follow (both competitors and companies to emulate), and a list of *content themes,* both *direct* and *adjacent,* to monitor for your company. You are in "stealth mode," researching what is going on on Facebook that is truly relevant to your brand.

Analyze Posts by Competitors and Other Companies

Returning to the regular Facebook interface, once you "like" a company, its posts have the opportunity to show up in your news feed. We'll dive into why or why not in a moment. However, for now, let me share a trick with you so that you can easily find the posts by Pages that you've decided to monitor.

Log in to your Facebook personal account, then scan down the left column and look for a link to Pages. Here's a screenshot:



Click on that, and then click on "Liked Pages." That will give you a quick list of pages that you like or follow. You can also bookmark this URL (**https://www.facebook.com/pages/?category=liked**) to your Start.me screen, so that you can quickly get into Pages you are following on Facebook.

For your second **TO-DO**, download the **Facebook Research Worksheet**. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), 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 setup and marketing strategy.

» UNDERSTAND THE FACEBOOK ALGORITHM

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*. You also need to understand how Facebook's **structure** interacts with its **algorithm** via **content engagement**.

Let's review this:

- **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 establishes a "friend" relationship between them.** 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 their timeline, person B will see that post on their feed** (with the caveat that the Facebook algorithm can make the feed very busy, prioritizing posts from friends with whom you interact over those from friends 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, The Facebook **algorithm** keeps track of which profiles, Pages, and posts are the most interactive and favors them in the feed across the social network.

- **Companies have Pages, not Profiles.** A *profile* (person) creates a *Page* (company) and then manages it as an Admin.
- **When a person ("profile") "likes" a business "Page," this creates a Facebook relationship between the "profile" and the "Page."** When I follow Safeway (**https://www.facebook.com/Safeway**), it means that when Safeway posts to its timeline, it may appear in my feed. By "liking" Safeway, I have given permission for it to communicate with 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, the Facebook **algorithm** tracks 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 **https://jmlinks.com/76w**. Note that you can technically create not just "Pages" for local businesses or places, companies, organizations, institutions, brands, or products. You can also create "public figure Pages" for artists, bands, 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.

It Gets Complicated

Here's where it gets complicated. The engineers at Facebook want **engagement**; they want people to be "hooked" on Facebook and stay on the platform for as long as possible. It's a bit like drugs and drug dealers, to be honest. Thus, they "reward" content that keeps people on the platform, content that is engaging or even "addictive." The algorithm thus "scores" profiles, pages, and even individual pieces of content. The more "engaging" it is, the higher its Facebook algorithm score and the more Facebook shows it to people. And the reverse is true. If you post boring content, few people see it, and over time, you get a "reputation" as a boring entity on the platform.

In essence, the *more* entertaining you are, the *more* people see your content. The *less* engaging, the *less* so. (This is true not just on Facebook but on ALL platforms – TikTok, YouTube, LinkedIn, X, etc.).

ENGAGEMENT = WATCH TIME, LIKES, COMMENTS, & SHARES

Let's return to the basics. 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 (also known as "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 *Facebook algorithm score* of that Page is improved. The higher the *Facebook algorithm score* (based on more interaction between that Page and the individual), the more likely it is that the post by the Page will show in the particular individual's news feed.
- A real-time analysis of the post: the faster and wider a post gets interactivity (likes, comments, and shares), the more powerful is the *Facebook algorithm score,* 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 a Page's posts, the higher the assessment of that Page and its posts, and the more likely users are to continue seeing posts by the Page in their news feed.

If you post a piece of content to your business Page on Facebook, how likely is it that a fan of your Page is going to see it in their news feed? The probability is a function of the **algorithm**, essentially:

- Content (video) that generates watch time…
- Content that generates a lot of likes…
- Content that generates a lot of comments…
- Content that generates a lot of shares…
    - Etc., etc., etc….

Factor in your "reputation" as a content producer as well. Are you generally exciting? Or boring? The long and short of the Facebook algorithm as a marketer is that the more *engaging* a post (profile, page, photo, video, meme, text) is, the *more* it will appear in the news feeds of your fans. Therefore:

Encouraging engagement is the #1 goal of your Facebook marketing!

To illustrate, let's consider the Mayo Clinic and my Facebook engagement.

1. I like the Mayo Clinic's business 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!"*), Even better, I "share" these posts on my own timeline by clicking the share button.

Here's a screenshot of a recent post by the Mayo Clinic:

Mayo Clinic
September 9 at 12:00 PM ·

At 17 months, Julian Limon has not yet reached walking or talking milestones. His brittle hair and unexplained neurological symptoms compound his challenges. He has endured pneumonia and other respiratory illnesses, and his weak immune system leaves him vulnerable. Despite extensive evaluations and genetic testing, Julian's condition remains a mystery.

This month, Julian's family will travel to Mayo Clinic in Minnesota to take part in the Undiagnosed Hackathon, a global effort to solve rare diseases that have long gone unexplained.

Learn more: https://mayocl.in/3JVyCD1

1.5K 230 comments 109 shares

If you look closely, you can see that this post has 1,500 likes, 230 comments, and 109 shares. The post has performed very well in terms of engagement! If I like, comment, and/or share it, I am also telling the algorithm that this is an interesting post. I am helping to push it along, perhaps even making it "go viral."

Behind the scenes, therefore, Facebook is more likely to push this post in front of Mayo Clinic fans because the more engagement a post receives, the more predictive it is that it will garner even more engagement. Facebook thrives on this "virtuous circle," and across all social networks, you'll repeatedly see that **driving engagement** is the Holy Grail of success in social media marketing.

Engagement, however, is relative, and every brand on Facebook is engaged in a competitive struggle to keep its fans engaged with content. Compare this post to a post on the Down Syndrome Awareness group, which advocates for persons and families impacted:

Down Syndrome Awareness & Support Group · Join

Iya Islam · September 11 at 12:23 PM ·

This is my son Jason who they said would not live past 12 he is now 50. Jason was born Jan 9,1975. Back then the doctors just wanted me to put him in a home. I said no and took him home. I am not saying it was easy because it was not. Things for babies with Down Syndrome have come a very long way.

Jason, from the start, has been my heart. He can make me laugh when I'm having a bad day. He makes me smile everyday. He loves to sing and dance so much. He is great at drawing pi... **See more**

53K 3.5K comments 909 shares

Like Comment Share

This post has 53,000 likes, 3,500 comments, and 909 shares. It's in a different league, entirely from the Mayo Clinic post. Notice that it is an even more **emotional** appeal based on a heartwarming story of love and perseverance.

In both cases, **social resonance** encourages likes, comments, and shares. Notice how the posts in both cases have interesting text, provocative photographs, and link 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 *Facebook algorithm score* (and the probability that people will see your posts in their news feed), you MUST get more watch time, likes, comments, and shares of your posts!
- To get more **engagement**, you must post content that is fun, content that mimics posts about friends, family, fun, photos, and fake, content that is emotional, content that is "awwwwww," content that is outrageous, and content that is counter-intuitive. You get the picture: don't be boring!

Encouraging **engagement** is the key to successful Facebook marketing. Indeed, a "share" is the best of all, followed by a "comment" and then by a "like," in terms of how the Facebook algorithm assesses your engagement.

ENGAGEMENT IS GOAL #1 FOR CONTENT ON FACEBOOK

Let's dig deeper here.

Posting strategy is all about what you post and using those posts to drive up engagement and improve your Facebook algorithm score. So, first, you've used content

marketing to identify the types of content that interest 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, consider packaging that content in a way that encourages them to like, comment, and/or share it on Facebook.

What drives people to engage? 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 I want to 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, *check out the trend for flaming hot Cheetos turkey for Thanksgiving*)… is also likely to work.

Here's a post about "free tacos," a promotion from Taco Bell relating to stolen bases during the World Series, with 3,600 likes, 279 comments, and 787 shares:

What's better than tacos? Free tacos! Better than free tacos? Free tacos when your team has stolen a base! It's fun. It's emotional. It's free. It's photogenic, and – not surprisingly – people "engage with it." People love tacos. People really love free tacos. And the Facebook algorithm really loves engagement!

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

MAN BITES DOG = ENGAGEMENT

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 4th of July, posts about how much you love a cause... Brands on Facebook often post "sentimentality bait," i.e., posts that people click the "like button" 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 the "like button" on these posts because they like their mothers... which is increasing the Facebook algorithm score of these posts and 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. Ubiquitous are things that people "think" are safe but, in fact, are dangerous, such as rawhide dog chews (*who knew that they were unsafe*?).
- **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, and Challenges**. Ask your audience a question and get them to use the comments as a way to interact with them. *Take this quiz and learn which Star Trek character best describes your love life.* Contests and challenges are big not just on Facebook but across platforms, especially Instagram and TikTok. What kind of contest or challenge might your brand create?

- **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 angry, so angry that they comment, "like" the posts in the sense of opposing the thing that outrages them, and even share the post with their friends. Outrage is huge on Facebook, and brands (somewhat 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 perfect 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?"*

In all cases, a good-looking photo or video is a must. Look back at the brands you have "followed" or "liked" and begin to notice how they are using strategies like emotion, fun, outrage, humor, or other ways to spur interactivity.

FACEBOOK REWARDS YOU FOR ENGAGING POSTS!

This gets to **posting rhythm**. Smart marketers will post ten or twenty "fun, fun, fun" posts to drive up their Facebook algorithm score and then one "buy my stuff" post that has a good chance of being shown in the news feed. So your posting rhythm should be something like 80% fun stuff and 20% or less "buy my stuff" posts:

> *Fun, Fun, Fun, Fun, Fun, Fun, Fun, Fun, Fun, Buy My Stuff, Buy My Stuff Fun, Fun, Fun, Fun, Fun, Fun, Fun, Fun, Fun,*

In other words, smart marketers build up their *Facebook algorithm score* by posting lots of fun, interactive content, and then "spend" their *Facebook algorithm score* with a "buy my stuff" post. Rinse and repeat as needed.

Withing your Facebook Page, click on the left "**Insights**" tab. Here, you can view data on the engagement of your posts, Reels, stories, and more. You can also drill into a specific post and view more data on engagement. The idea is to identify the type of

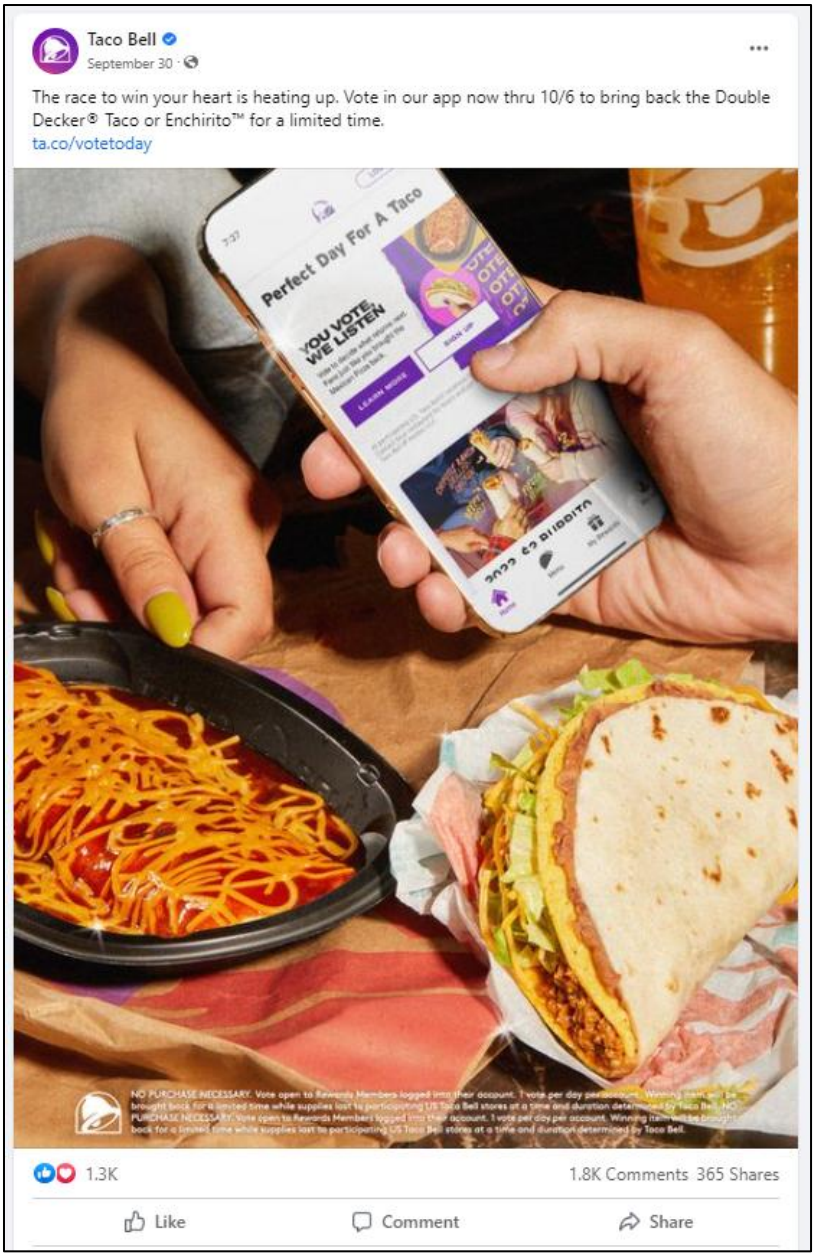
content that generates the highest engagement for you. Produce more of that. Produce less content that doesn't get engagement.

Get Your Super(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 product or a silly "challenge" that relates to your content themes), 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 lot more attention to posts by people than to posts by Pages. So, by all means, post content to your business Page that excites your fans so much that they feel compelled to share it! (We'll return to the importance of fans and superfans at the end of this Chapter).

If it Works, Keep Doing it.

I've already pointed out that Taco Bell gives away free tacos after a "stolen base." But here's another thought. They don't just do this once. They do this repeatedly; if you find something that works, replicate it over and over. Taco Bell has been doing this for years. **Taco Bell uses Facebook to spur engagement with its most devoted fans.** For example, here's a post about a "referendum" to bring back (or not) the Double Decker Taco or Enchirito. Note that it has 1,800 comments and 365 shares:



Now, that's a lot of engagement! The point is that this promotion was used to generate numerous "spontaneous" shares by Taco Bell fans, thereby leveraging the "superfans" of Taco Bell to create viral buzz on Facebook. Remember – a share means that the friends of a friend see the post. Thus, the "superfan" of Taco Bell shares it with her friends, and they see her enthusiasm for this critical referendum. So ask yourself, what is your "Taco promotion" that your fans will take over the finish line (to mix sports metaphors)? And once you find content that works, keep doing it.

Contests and Challenges

Another content theme that you see on Facebook is "contests" and "challenges." The former usually means that the brand requires fans to take a specific action to receive something for free. The latter is usually just a shout-out to do something that is somewhat challenging and then share it on Facebook. The former means you get something free; the latter means that you're just cool and talented. The former appeals to users' interest in free stuff; the latter appeals to their desire to "show off."

Search Facebook for "contests" and "challenges" to see current examples. Even better, look for the hashtags #*contest* and #*challenge* as in:

https://www.facebook.com/hashtag/contest

https://www.facebook.com/hashtag/challenge

Unfortunately, you will encounter a lot of spam, often of an adult-oriented nature – but the key is to look for examples of "contests" and "challenges" that are relevant to your customers, your industry, and your brand. "Reverse engineer" contests and challenges in your industry, and then brainstorm your own. "Engagement" can be nurtured. It's not necessarily spontaneous.

> **AI PROMPT.** Explain to ChatGPT what "contests" and "challenges" are on Facebook. Prompt it as follows: "With your knowledge of contests and challenges on Facebook, give me a list of ten ideas for each. Emphasize those that have the highest potential for user engagement and cost us the least money!"

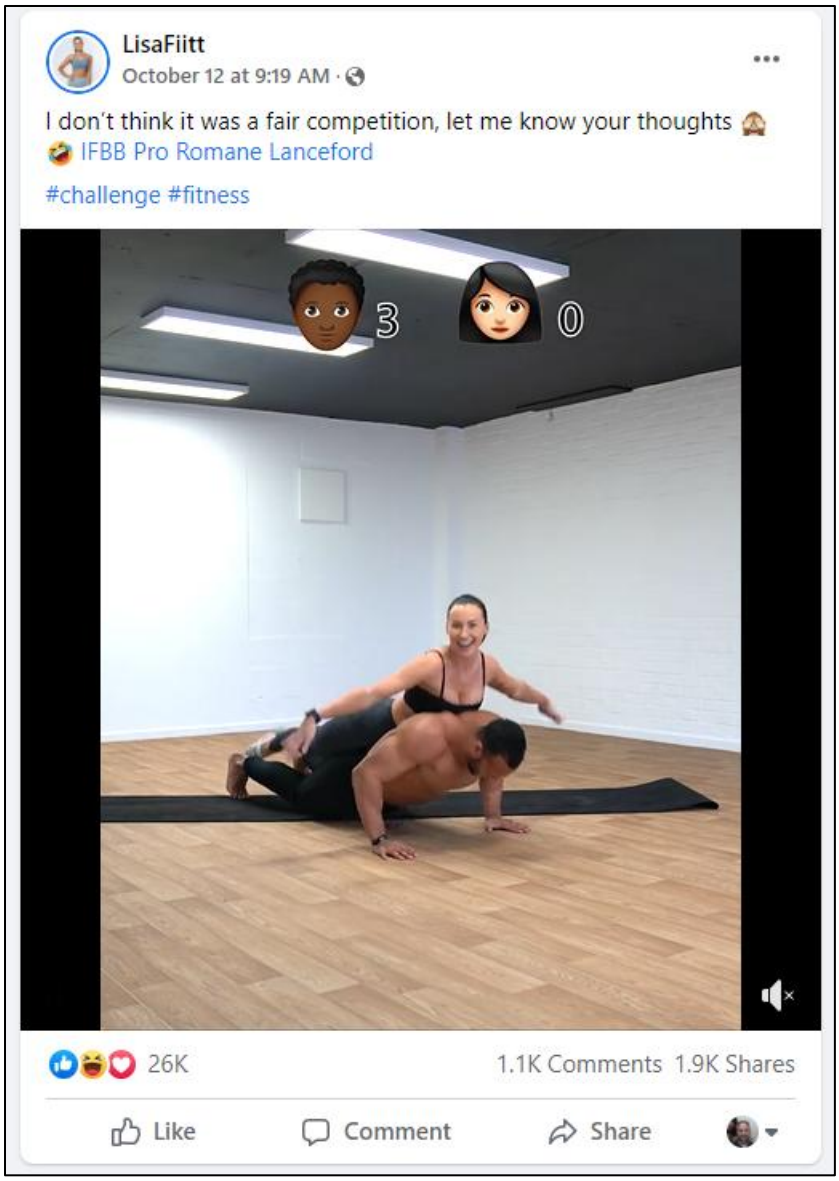
Facebook Rewards Posts by People over Posts by Pages

The reason for this tactic is that people's Facebook algorithm scores are much, much higher than the Facebook algorithm scores 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 *Facebook algorithm score* of your Page, but also in that 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 with their own friends and family).

Let me repeat that:

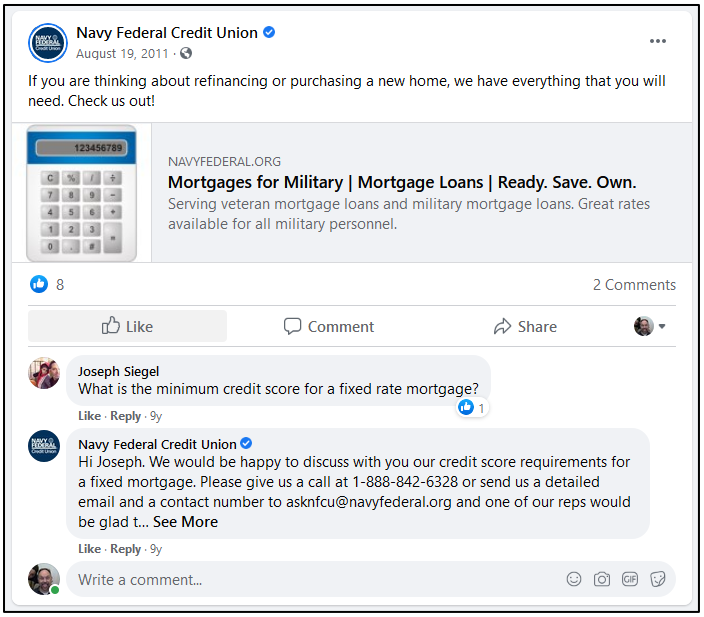
The *Facebook algorithm score* of people is much higher than that of company Pages. **Therefore, encouraging your customers, fans, and superfans to share your posts is a crucial component of an effective Facebook marketing strategy.**

For example, here's a post showcasing a "fitness challenge" with 26,000 likes, 1,100 comments, and 1,900 shares:



Note that it is also in video format. It's fun. It's intriguing. It asks for comments. It's "designed" to foster engagement, and the Facebook algorithm clearly loves it.

Compare that with this "buy our stuff" post by Navy Federal Credit:



This post has only eight likes, two comments, and zero shares. Why did people "share" the first post and not the second? I think you know the answer: emotion, fun, cool photo, etc., vs. a boring topic (mortgages). Girls just want to have fun on Facebook, and so do boys, men, women, moms, dads, and everybody else. You gotta be fun to succeed with your content marketing!

Facebook Rewards Video over Photos and Text

The trend on Facebook (as everywhere else) is: **video**, video, and more video. Facebook Reels (which are similar to Instagram Reels and TikTok) generally produce more engagement than still photos. You can browse and search Reels at **https://www.facebook.com/reel/**. People love "lean back" medium – that is, funny, informative, engaging, and over-the-top content in video format because video is "easy" to consume. (We'll cover video theory in our YouTube chapter.) But for now, to the fullest extent possible, prioritize video content for your Facebook Page, as well as video content encouraged by you and produced by influencers, superfans, and regular customers. The future is video, and it's already here.

Buy My Stuff Matters, Too

However, you can't just post content focused on engagement. You also need "buy my stuff" posts. Why? Because you have two (interrelated) goals on Facebook: 1) build up engagement, and 2) "spend" this engagement on posts that lead to a goal, such as a purchase or sales lead. You can't just post for engagement, and you can't just post to sell your stuff.

POST 80% OR MORE ABOUT "FUN" AND 20% OR LESS ABOUT "BUY MY STUFF"

If you reverse engineer the content strategy of Navy Federal Credit Union on Facebook, for example, you'll see that the brand is posting items to drive up interactivity (fun stuff), and then occasionally posting items that are aimed at selling its products or services (serious stuff). So its posting rhythm is:

> *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:

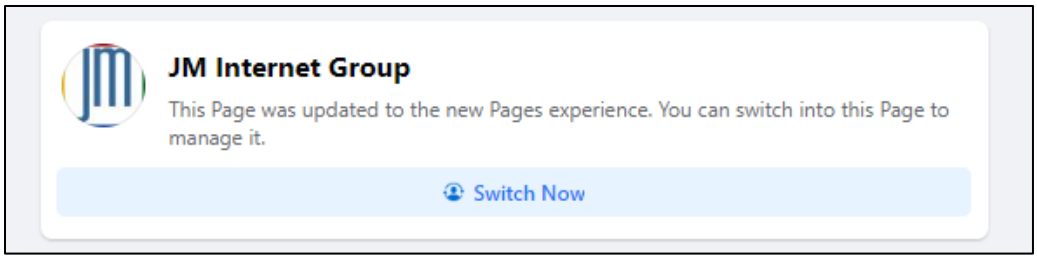
> ***Engagement***: Increasing the engagement of a Page's posts improves the *visibility* of all its posts to some degree. (Note: this is also a reason to pay attention to the time of day because *engagement* is determined "on the fly," and if a post does well "out of the gate," it will tend to do better over time).
>
> **Social Sharing**: getting the fans of a Page to share the posts with their own friends and family.

Generally speaking, highly interactive posts receive boosts on both measures. As you reverse engineer the posting strategy of competitors and/or brands that you admire on Facebook, notice how they try to spur either one or both of the above. And as we will discuss in the next Chapter, innovative Brands allocate budget for Facebook ads if Facebook is a platform that their customers use.

» 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 Facebook Business Page. A good way to do this is to compare/contrast Pages that you like and use your inventory list to identify to-dos. Let's go down item by item to see things you need to do in terms of Facebook Page Setup.

After you've set up a Page, you need to toggle between your "Personal Profile" and your "Business Page." To do so, log in to your Facebook account, then find "Pages" on the left, then "Pages you manage," and then click "Switch Now." Here's a screenshot:



Alternatively, on the top right menu, click on your profile and then "See all profiles." Find your Business Page and switch into it.

Now, you're inside your Business Page. We won't click into more advanced features, such as the "Professional Dashboard," yet. We're just going to do the basics.

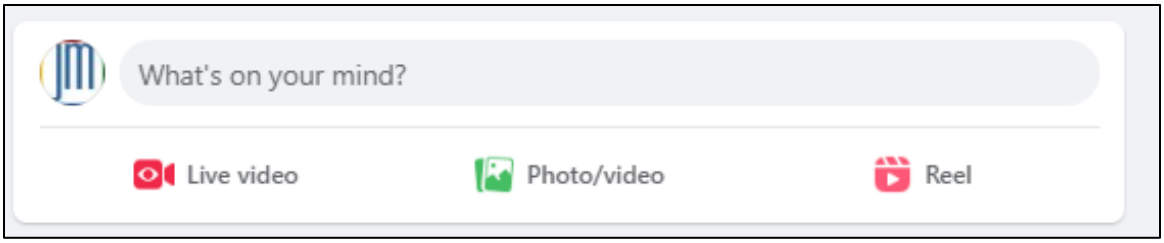
First, let's set up and optimize our basic Page features:

- **Cover Photo**. Click "Edit Cover Photo," and you can upload and change the cover photo of your business page.
- **Edit Page**. Click "Edit" and this will get you into "Edit Page." Here, you can edit your "Profile Picture," "Cover Photo," "Bio," and "Intro."
- **About Info**. Click into "Edit your About Info," and edit your business category, physical address, website, and other information about your business.
- **Reviews**. This is an important feature. Here you can turn "on" or "off" the ability for customers to review your business.
- **Three Dots**. On the far right, look for the "three dots." Click here to edit your "Action Button," which is your CTA (Call to Action) that appears on your page, as well as other minor functions.

At this point, you've accomplished the basics. You've set up a Facebook Page for your business and optimized its structure.

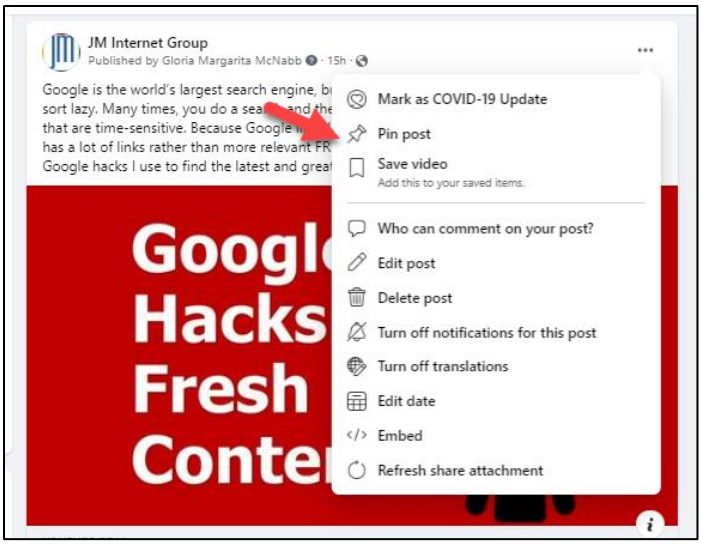
Start Posting

The workhorse of your Facebook strategy is to post content. To do this, just click on the "What's on your mind" box that appears at the far right. Here's a screenshot:



You can simply start typing, post some text, and upload a photo or video. The buttons underneath – Live Video, Photo/Video, or Reel – refer to the types of posts. A "Reel" is a short video in the TikTok format.

Finally, you can "feature" or "pin" a post (or a series of posts) by clicking into *Featured* > *Manage* or on a post clicking on the three dots to the right. Here's a screenshot:



Note that when you "Pin" a post, it appears in your "Featured" section, which is the first set of items a user sees when they click on your business Page.

For your third **TO-DO**, download the **Facebook Setup Worksheet**. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), and click on the link to the "Facebook Setup Worksheet." You'll answer and outline the basic setup issues for your Facebook Page.

» TOOLS TO MANAGE YOUR FACEBOOK BUSINESS PAGE

Beyond the basics of your Facebook Page, there are some key tools to manage things at a more sophisticated level. Note that throughout, you may have to "toggle" between your personal profile and business page (or "profile"). To do so, click on your icon in the top right corner. Next, click on "see all profiles" and find your business. Then, toggle into your business to access the main features. In addition, the main Business Page Management features are a) your Page itself, b) Professional Dashboard, c) Meta Business Suite, and d) Meta Ads Manager. None of these tools are clearly interconnected with each other.

Stay positive and remember that some features are in one tool, some in all tools, and some are randomly distributed around the Meta interface. It's a mess. We've reviewed your Facebook page, and now let's examine the other tools (except Ads Manager, which we will cover in the next Chapter on advertising).

Professional Dashboard. If you are logged in as your Facebook Page, click on "Professional Dashboard" on the left menu. This provides insights into the engagement of your posts, giving you key data points for you to learn what posts people like and which ones they do not. Click "See more insights" on the top right. Here, you can find additional data on your Facebook Page and its Posts, as well as interactions with fans. Then, on the left menu, here are some key tools –

Insights. Explore engagement metrics. What content got the most likes, comments, and shares? Make more of that.

Content. Browse or create posts here. You can also schedule posts via the Meta Business Suite as indicated.

Engagement. You can give "badges" to your superfans or do other incentive programs to help them get excited about your Page.

All Tools. Click here to find even more tools to help manage your Facebook Page. Among them are "Comments manager" (manage user comments), "Events" (create a Facebook even), "Moderation Assist" (use AI to moderate

user comments), "Fan engagement" (create spiffs to encourage Page followers), "Inspiration hub" (look for ideas for content), "Page access" (manage who can manage your Page), "Ad Center" (manage ads), and "Meta Business Suite" (see below).

Meta Business Suite. It is nearly impossible to get from your Page or "Professional Dashboard" to the "Meta Business Suite." Yet, the Meta Business Suite is a crucial way to manage your Page and its marketing efforts. Here's how to get to and enable the "Meta Business Suite" (which is different from the "Professional Dashboard"):

1. Google "Meta Business Suite" and click on the link.
2. This should direct you to **https://business.facebook.com/,** where you should see "Meta Business Suite" on the top left.
3. Verify that you see the Company Page you want to manage on the top left menu. Or, use the pull-down menu and select your company page.

Alternatively, inside Facebook:

1. Log in to your Facebook Business Page and switch into it as your account (Top right).
2. Click on "Meta Business Suite" on the far left.
3. Using the pulldown menu (top left), verify you are using the correct Facebook Business Page if you have more than one business Page.

I usually bookmark the link to the "Meta Business Suite" (**https://business.facebook.com/**) on my *Start.me* page so I can easily access it. If you're a mobile phone person, you can also download "Meta Business Suite" to your mobile phone as an app.

Here are some of its key features –

Manage More than One Business. If you have more than one Business Page, you can access them all through Meta Business Suite. Just use the pull-down menu at the top left.

Notifications. Easily see and respond to users' posts on your page content.

Planner. This allows you to see and schedule posts into the future. This is a one-stop shop for planning and creating content, including posts, reels, stories, and going live.

Content. You can gain insights into posts, Reels, and stories, as well as their engagement.

Insights. You can see even more data on engagement across posts, Reels, and stories.

Inbox. You can manage your Facebook messages from customers here. Also, at the top right, under the "Nuclear Icon" (automation), you can set up Chatbots and other messenger automation for your Business Page. You can also see and manage comments to your posts here.

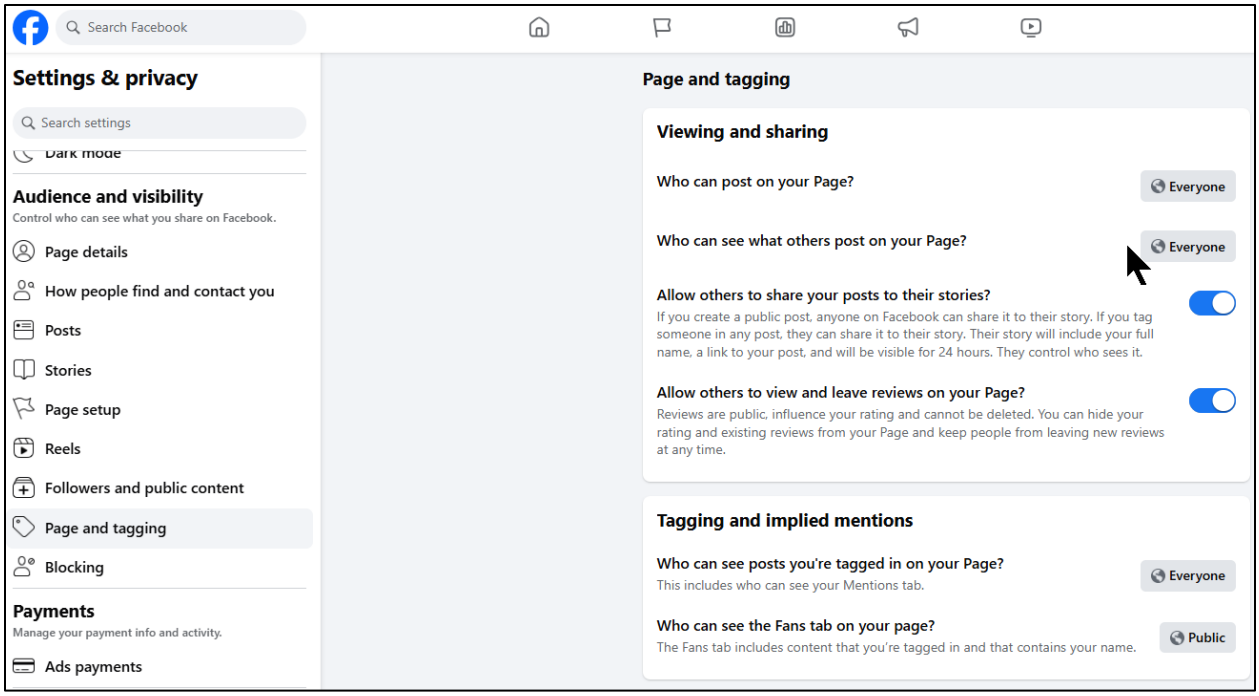
Monetization. You can "monetize" your Facebook feed if you're a heavy content creator or influencer.

Ads. You can access Facebook Ads here, as well as in Meta Ads Manager.

All Tools. You can view additional tools here, as well as your billing information. Among the more important are a) Ads Manager, b) Audiences (more below), and c) Events Manager.

Finally, let's talk about **Page settings**. These are not easily accessible with the tools above, so let's return to your Business Page. To access Page settings, log in as your Page and be on your Page. Next, click on your Page Profile Icon (Top Right). Select "Settings and Privacy," "Settings," "Privacy. Center," and then "Settings" and then "Facebook Settings." Look at the Left Menu for Page Settings you can optimize.

Here, you can manage the visibility of your posts, such as "who can see your posts," whether you want your page to be visible to Google, and if you want to be able to receive messages as your page. Here's a screenshot:



You can also "block" nefarious individuals from interacting with your Page here. Just select "blocking" on the left menu. You can also manage how individuals post to your Page (such as blocking profanity) under *Privacy* > *Public Posts*, and then in the middle of the Page, under "Content moderation." Importantly, "Page Access," as in who is an Admin of your Page, is not here. That is managed under *Your Page* > *Professional Dashboard* > *Page Access*.

Throughout this process, remind yourself that if you have a question, you MUST look through the four areas of Page management to find the answer: a) your Page, b) Professional Dashboard, c) Meta Business Manager, and/or d) Ads Manager. I recommend spending some time with each of the four products, clicking around and exploring the available features and their locations. Remember, if you can formulate a question, you can use Google, YouTube, or ChatGPT to find the answer. For instance:

How do I enable Facebook recommendations?

How can I block a user from my Page?

How can I schedule a post on Facebook?

Why did God put a youngster in charge of Meta?

And so on and so forth.

Once you make peace with the disorganized Facebook interface, you'll get the hang of it. However, there is no substitute for exploring and learning where things are located by just clicking around at every option.

» Brainstorm and Execute a Posting Strategy

Don't fall into the trap of over-focusing on your Page and Page setup! That's not where the action is on Facebook! The action (for users) is on the **feed**. Most of what shows on the feed is:

Posts. Posts by other people, ads, and posts by Pages (that is, text, photos/images, and video).

Video has by far the highest engagement.

Reels. Reels show on the phone app and on the desktop as short videos.

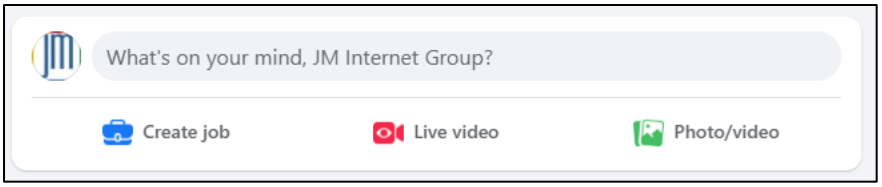
Stories. Stories are short, once-a-day photos or videos as to "what's happening."

Nowadays, the lion's share is also on the **phone** (not the desktop, not the tablet). So be phone-first and phone-centric, but don't be phony. Authentic, fun content that fits the vibe of friends, family, fun, and fake (by fake, I mean "positive" not not true) – that's the content that works on Facebook.

You must systematically produce and share a large amount of content on your Facebook page. A good goal is to post at least one post per day on your Facebook page, if not two or even three. Post text, photos, and videos. Post Reels. Post to your Story. Post content that your Superfans will see and love, and that they will share with their friends and family. Post, post, post, post, and then post some more – quantity, yes, but even more, quality – engaging, fun posts.

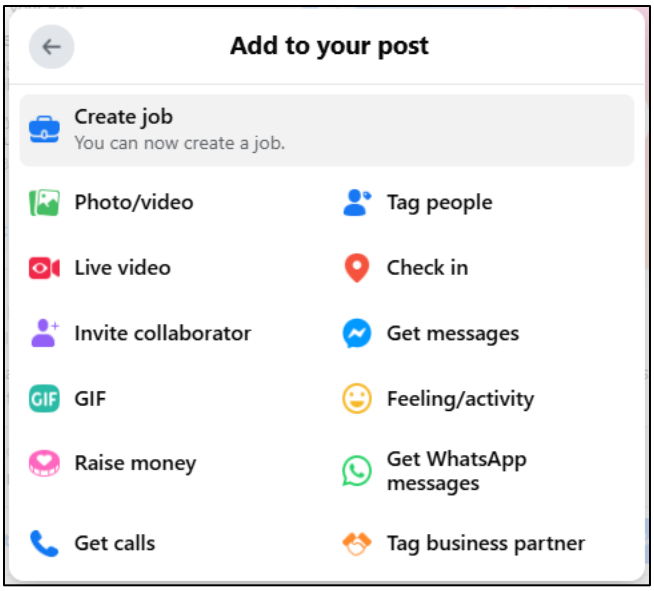
Choose a Post Type

When you first log in to your Page, you'll see a blank box that says, "What's on your mind?" Here's a screenshot:



The most common post type is to write some text, click Photo/Video, and then post. This is the vast majority of posts you will see. The second most common would be a video post.

There are, however, more complex options. Click on the three on the bottom right, for instance. Here's a screenshot:



You can thus enhance your posts or create variants, such as a "Feeling/activity" or "Tag a business partner." If you're curious about what one is, click on it or search for it on Facebook help by name.

Turn to the content marketing section of the *Marketing Almanac* for a list of tools that will help you find other people's content and create your own. I recommend Hootsuite (**https://jmlinks.com/29k**) to manage all your social postings across platforms. Still, I also recommend that you vary your posting strategy so that you have some posts that go live instantly, some that are "natively" scheduled within Facebook, and still others that are posted by a third-party app like Hootsuite or Buffer. This is to cover all your bases regarding the Facebook algorithm.

Four Types of Content for Facebook

Remember the four types of content and flesh out what type(s) will make the most sense for you on Facebook:

Your Own Content. This involves creating blog posts, photos, videos, infographics, and other engaging content yourself. Note that the format receiving the highest engagement is generally native video (videos uploaded directly to Facebook), and the content with the highest engagement is almost always emotionally charged in nature.

Other People's Content or Content Curation. This involves using tools like Feedly or Google News to identify fun and engaging content from others and share it on your Facebook page as a "helpful expert."

UGC / User-Generated Content. This is creating opportunities like Facebook contests or hashtags that encourage users to "spontaneously" create content and share it either on your page or about your brand on Facebook.

Interactive Content. This involves logging in as your Page and commenting on posts (and/or comments) made to your Page and its posts, as well as identifying and interacting with the content of fans and superfans. A significant opportunity is "tagging" page followers when they mention something positive about your brand, and engaging with influencers and superfans about your brand.

Throughout, remember that all content you post on Facebook needs to be focused on friends, family, and fun, with a good dose of emotion and counterintuitiveness to encourage social sharing. The only exception is the 10-20% of your posts that will be "buy my stuff" type, but even for those, try to tilt your message towards friends, family, and fun.

For your fourth **TO-DO**, download the **Facebook Posting Worksheet**. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), and click on the link to the "Facebook Posting Worksheet." You'll systematically build out a posting strategy based on the four types of content.

Once you've completed this, it's time to post. Remember that Facebook marketing requires a commitment of time and resources. You can even create an editorial calendar and assign tasks to team members, allowing you and your team to post on Facebook regularly.

How frequently should you post?

Because the Facebook news feed is very crowded, you can safely post quite frequently, even several times a day. However, this varies with your audience, so pay attention and use the Insights tab to determine which posts receive the best response and whether

the time of day matters. Pay attention to your Page's likes and dislikes to see if your posts delight or annoy your followers.

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

» PROMOTE YOUR FACEBOOK PAGE AND POSTS FOR FREE

Once you've set up your page and started to post content regularly, 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 fresh, fun, and engaging content. These "trust indicators" will encourage them to like your Page, thereby allowing you to post to your timeline and (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 food and entertainment for people to show up and stick around – that is, great and engaging content. 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 regular basis? What content will they find on your Page that will excite and engage them?

Let's focus first on free ways to promote your Page and its posts. Here are some strategies:

- **Real World to Facebook.** Ask customers to like your Facebook page face-to-face. If you are a museum store, for example, be sure that the cashiers recommend to customers that they like your Facebook Page. *Why? Because they'll receive insider tips, fun DIY posts, and announcements about upcoming museum and museum store events, among other benefits.* If you are a dentist's office, ask them to like your Facebook Page, perhaps to be entered in a contest for a discount or gift certificate. Have all customer-facing employees ask customers to like your Facebook Page, and train them with a ready answer as to why "liking" your Facebook Page is worth it.
- **Hashtags and Trending Topics.** While not as important on Facebook as on Instagram, X, and LinkedIn, hashtags do exist on Facebook. Create a "custom hashtag" for your brand and/or research hashtags on Facebook and include them in your posts. See **https://jmlinks.com/43e** for an example, and see **https://jmlinks.com/43g** for more information.

- **Cross-Promotion**. Link your website to your Facebook Page, your blog posts to your Facebook Page, your X to your Facebook Page, etc. Notice how big brands like REI do this: one digital property promotes another.
- **Facebook Messenger for Business.** Facebook Messenger is a text message app owned and operated by Facebook. It is highly popular, especially outside of the USA. To enable Messenger on your Facebook Page, click "Settings" at the top of the Page, then click "Messaging." Next, check the box to allow people to contact your Page. Learn more at **https://jmlinks.com/43p**. Commercial products, also known as "chatbots," utilize Artificial Intelligence (AI) to automate this process. Search for "Facebook Chatbot" to find an array of vendors offering these services. Note: Facebook has a similar product called "WhatsApp," which is more of a direct messenger app, not connected to Facebook.
- **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 **https://jmlinks.com/37r**. You can also let Facebook "invite" your (personal) friends on Facebook to like your Page. Just click on the three dots on your Page and then "Invite Friends."
- **Interact with Other Pages**. Interact with other Pages, share their content, comment on timely topics using hashtags, and reach out to complementary Pages to collaborate on co-promotion. Use the Facebook search feature to find other Pages that are interested in your keyword themes and comment upon them while logged in as your Page. To learn how to do this, visit **https://jmlinks.com/43h**.
- **Leverage your Fans and Superfans**. 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 proactively want to share, such as funny memes, contests with giveaways, scholarship opportunities, coupons, and useful "how to" articles.

- **Interact with Your Fans and Others**. Your Facebook Page shouldn't just be one-way. When a fan likes, comments, or shares your post, respond to them in the comments section. Empower your employees as individuals and your brand as a Facebook Page to talk with customers on Facebook. Respond to reviews posted by customers on your Facebook Page as well.
- **Identify Influencers**. Find people on Facebook who have a large number of personal followers and are willing to collaborate with your brand. Some may charge money, while others may promote your brand for swag, stuff, or even for free. But regardless, identify and reach out to high-profile individuals who can share your Page content with their followers. Always remember to explain to any influencer what's in it for them: it may be a direct payment, a free product sample, or a co-op promotion, but there has to be something "in it" for them (or they won't do it).

Local Businesses: Reviews and Check-ins

Local businesses have two critical promotional tactics. First, there are customer **recommendations** on Facebook (formally called "Recommendations and Reviews"). A "local business" that enters a physical address into Facebook enables the "review this business" feature. Once the feature is enabled, you can then ask customers to review you on Facebook (via email, in person, etc.), and when they write a review, Facebook may alert their friends and family, thereby leveraging one happy customer to reach new ones. To learn more about recommendations on Facebook, visit the help file at **https://jmlinks.com/43f**.

Here's a screenshot of the "Recommendations Tab" for "Tacos for Life," a popular Taco Chain with a location here in Tulsa:

You can see that it has 475 reviews and an 86% rating. Lauren Lee thinks that the "Carnitas are the bomb," while Tyler Tesson believes that "The staff is very nice and helpful." Reviews encourage "social spread," as when a customer writes a review, the Facebook algorithm can highlight it to friends and family. Study after study shows that people are most likely to believe friends and family when making a purchase decision. If you drill further into reviews on Facebook, however, you'll notice that they are not always positive. Brands can't control which reviews are posted, so be prepared for both good and bad reviews if you enable this feature.

I discuss review marketing (such as reviews on Google, Yelp, and other local platforms) in much greater detail in my *SEO Workbook*. Suffice it to say, in terms of Facebook, that if you enable reviews, you want to encourage happy customers to write reviews and be ready to deal with unhappy customers, attempting to assuage their concerns to the greatest extent possible.

Incentivize Customers to "Review" and "Check In" to Your Business

Something as simple as asking happy customers, "Please review us on Facebook," can make a difference by increasing your review count on Facebook. Motivate your

employees when they encounter a happy customer to ask, "Hey. Could you do us a favor? Write us a review on your Facebook page." You can even generate text messages and email links to make it super easy for your most devoted customers to "share the love" via Facebook reviews.

Check-ins on Facebook

The second benefit of being a local business on Facebook is "Check-ins." "Check-ins" allow customers who are at a physical brick-and-mortar store to "check in" via Facebook on their phones. This means that their friends and family can see that they've checked in, thus giving social credence and social spread to your business. Any local business should make sure that it is correctly set up as a local business on Facebook and has enabled the check-in feature. Then, encourage customers to visit the business in person. Perhaps, for example, have a weekly contest among customers who check in to win something like a $50 gift certificate. 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 and having people "check in" at your trade show booth. To learn more about Facebook check-ins, visit **https://jmlinks.com/37q**.

» WORK WITH "SUPERFANS" ON FACEBOOK

Organic reach on Facebook is nearly dead. This means that, regardless of the quality of your content, the reach of your Business Facebook Page into the feeds of your target customers will be minimal. This is for two reasons: first, *humans* tend to prefer the content of other humans, rather than that of brands and marketers. They want to see photos and videos of their friends and family, not those from boring companies that are salesy and cheap. Second, Meta is a business, and it's clear that they deprecate the reach of Pages to "encourage" Pages to advertise. Zuck has bills to pay, and he does this by forcing brands to advertise.

What is to be done? Your first strategy is to create engaging and viral posts that are counterintuitive, photogenic, and fun themes – "man bites dog" content, not "dog bites man" content. Your second strategy is to leverage your **superfans**. Superfans are customers who truly love your brand and are part of your tribe. Here, for example, you can create a challenge or a contest, advertise that content to your Superfans (as discussed in the next Chapter), and rely on your superfans to push your content out through their timelines. This is easier said than done, but having a vibrant tribe of people who love and engage with your brand's content is almost the only way to achieve "free" organic reach on Facebook nowadays. Third, as we shall discuss in the next

Chapter, you should combine ads and organic content so that your posts reach your superfans and your superfans share your content with their friends and families.

» NURTURE FACEBOOK GROUPS

A significant opportunity on Facebook, one that builds on your superfans, is Facebook (Branded) groups. Facebook groups bring together like-minded individuals. For example, I'm a proud member of the Group "Absurd Signs," which asks users to contribute funny, weird, and absurd signs to Facebook. I heavily interact with the group as I have a passion for language, love a good pun, and love a "double entendre" even more.

Here's a screenshot of a recent post:

Now, this is just a fun group of silly people like me who love language. However, Facebook groups present a significant opportunity for brands to collaborate with superfans and cultivate a positive community.

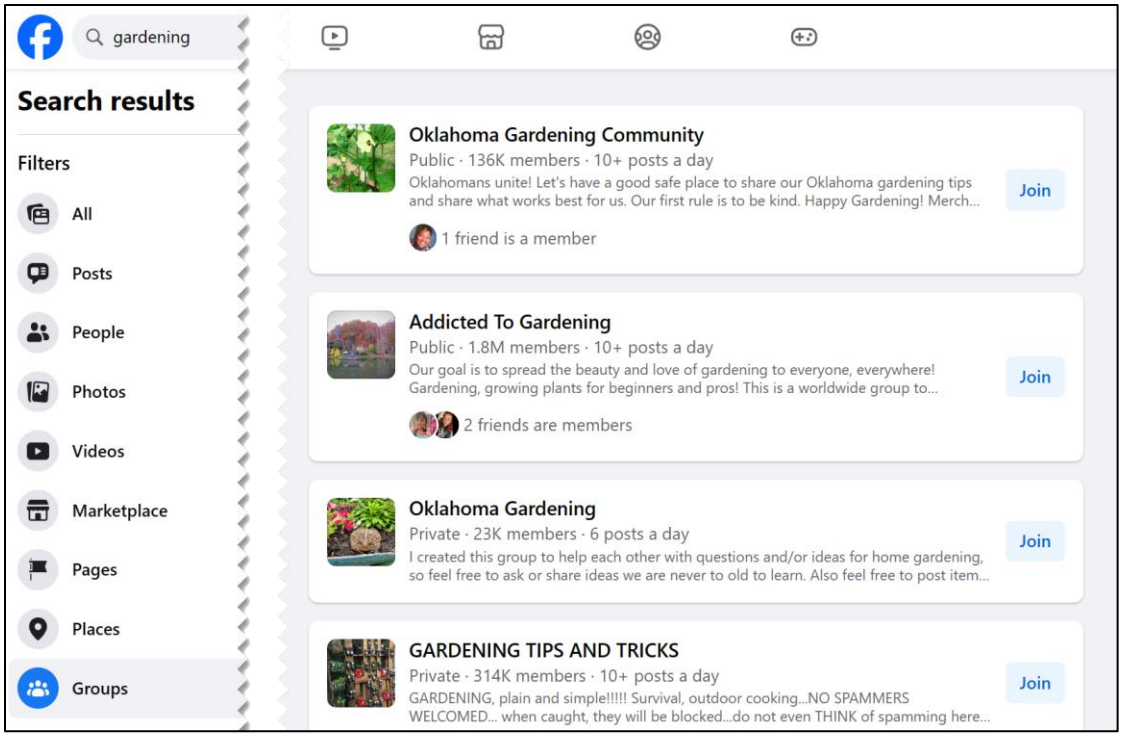
A fantastic example is the "Instant Pot Community," which brings together cooks and fans of the Instant Pot "smart" cooker at **https://jmlinks.com/54w**. This branded group focuses on recipes, tips, and tricks on how to get the most out of the product. It has 3.2 million members! In summary, look to your companies-to-emulate and competitors to see if any have created and nurtured a **branded Facebook group**, that is, a group of customers around the brand who are "brand ambassadors." Then consider making your own branded Facebook group, but remember that the key is to be the "nurturer" and not the "boss" of these group opportunities.

The good news is that groups have a lot of engagement and tend to show up easily in the news feeds of members. The bad news is that not every company has an obvious branded group opportunity, as Instant Pot does. And be aware that groups mean you are not entirely in control; hecklers and spammers can be a problem. Here are two key opportunities:

Group Marketing (Direct). If you decide that a branded group focused on your company, products, or services is right for you, here are some key considerations. First and foremost, what's the point of the group? Why will customers want to join it? After all, a group is, by definition, an interactive entity. Anyone can post, and anyone can chime in. So, your best group is one that is customer-focused and almost "runs by itself." As the group manager, you should take a back seat and let the customers lead the way. Second, you can take the lead in some instances by sharing insider stories, tips, secrets, and tricks about your company or product/service. The best groups are really for "superfans." Third, you can make a group private or public and adjust the settings to give you control over who gets in and how. You can also moderate the comments (or choose not to). Learn more about the technical issues of Facebook Groups at **https://jmlinks.com/43j**.

Group Marketing (Indirect). Another way to market via Facebook groups is to join them as an individual and promote your own company by being a "helpful expert." A photographer, for example, might join groups focused on weddings and then share her expertise on how to take great photos. A company that sells crafting and quilting products might have its CEO join and contribute to Facebook groups that focus on arts and crafts. Or a company that sells birding tours might join birding groups and contribute useful content, photos, and posts to bird enthusiasts. The point here is to be helpful, relevant, and an expert, allowing the publicity to flow back to your brand in a low-key way. Search for groups by typing in your content themes into the search box on Facebook and selecting groups on the left.

Here's a screenshot of a search for "gardening" groups on Facebook:



» Odds & Ends: Events, Facebook Live, etc.

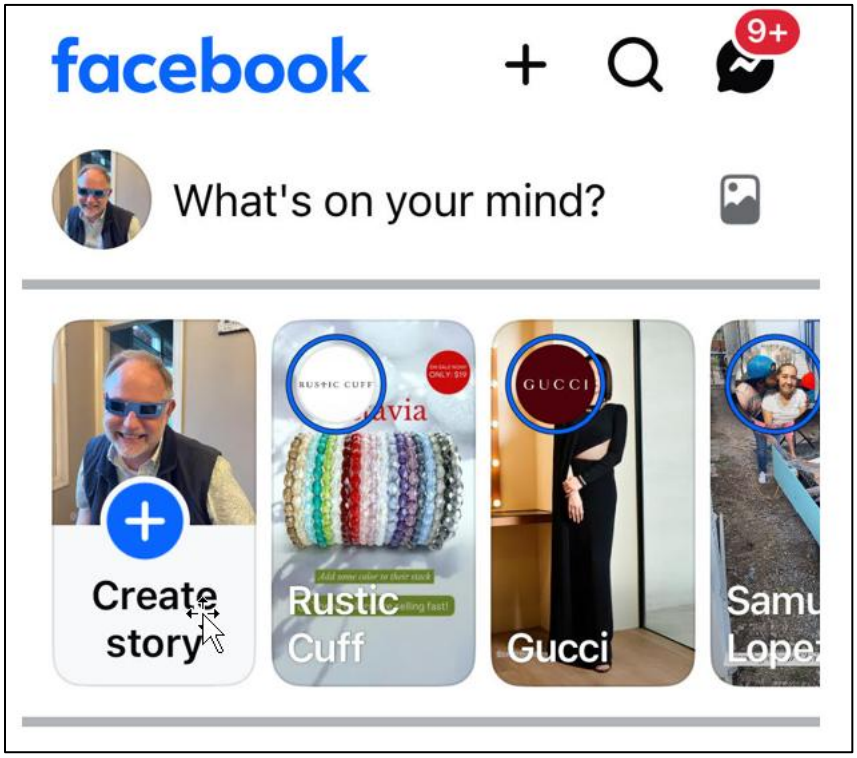
While posts by Facebook Pages constitute the lion's share of marketing on Facebook, there are other opportunities. Indeed, "events," especially those streamed live on Facebook, continue to have good algorithmic reach. Let's run through those now.

Facebook Events. If your company can host real-world events or even live or virtual events on Facebook, you can set up an event. Just as in the real world, an event lives on a calendar and presents an opportunity for people to learn more, purchase tickets, and so on. Think of an event like a book reading, poetry slam, or perhaps a fashion show at your store, just in digital format. Learn more at **https://jmlinks.com/43k**.

Facebook Live. Persons and Pages can now stream live video on Facebook. The trick here is to figure out what type of video content your fans would like to see (and participate in) live. It's great for product demos, lectures, book readings, and other types of content that might exist "in the real world" but translate easily into video. To see examples of what's being streamed live on Facebook right now, visit **https://www.facebook.com/watch/**.

Facebook Stories. Brands can create "stories," which are short video vignettes that tell the "day in the life" of your business. Originally started on Snapchat and Instagram, these are yet another way to stay in touch with your superfans. Learn more at **https://jmlinks.com/53a**. For story ideas from brand pages that you follow, you can go to *facebook.com/stories* or visit **https://jmlinks.com/53b**. The best stories share fun, interactive, and "insider" information about a "day in the life" of your brand.

Even stories by brands tend to appear high in the feed on mobile phones. For example, here's a screenshot of my feed showing a "Facebook Stories" by Rustic Cuff and Gucci, two brands I follow on Facebook:



Posts, events, Facebook Live, Reels, groups, and stories - each is a unique use of Facebook. They're not for every business. The main questions to ask are:

1. Will your customers be interested in this feature? Why or why not?

2. What will you share/talk about / post to the feature? If it's an event, for instance, what kind of event will it be? What will happen at the event? If it's a group, what will be the reason for the group, and what will you (and others) share in the group that will be interesting? If it's live, what will happen during the live broadcast? If it's a Story or a Reel, what will the video be about?
3. How much time will it take for your business to create or nurture the content? What content opportunities are easy for you on Facebook?
4. Does it have organic reach? Some, like Reels and Stories, continue to have organic reach on Facebook, while others, such as text and photo posts, have almost zero organic reach.
5. How will you promote it? A Facebook group, Facebook Live, or Facebook Event will not promote itself. You have to promote it, just as you'd promote the real-world equivalent. Advertising may be the only answer.

»» CHECKLIST: FACEBOOK (ORGANIC) ACTION ITEMS

Test your knowledge of Facebook! Take the *Facebook marketing quiz* at **https://jmlinks.com/qzfb**. (though I recommend you read the next Chapter on advertising first, as the quiz covers both organic and ads). Next, here are your Facebook **Action Items**:

❑ **Research** Facebook to find out whether your customers are on it and what they are doing. Identify **content themes** that are either directly relevant to your brand or adjacent to it.

❑ **Identify** both **competitors** and **companies to emulate**; "reverse engineer" their Page setup and posting strategies.

❑ **Investigate** which types of **posts** are getting the most **interaction** from fans and why. Pay attention to whether these are in keyword themes directly related to your products or services or just adjacent to them (or both).

❑ **Set up and Optimize your Facebook Page**. Identify profile and cover photo art. Select the appropriate sections, including whether to enable the "review" tab or not, and whether to allow posts to the Page by fans.

❑ **Optimize Your Page Settings**. Identify Page administrators. Turn key settings on or off, such as message filters, blocked users, and check-ins. Pin posts

to the featured slot. Go through each setting for your Page and ensure it is what you desire.

- ❑ **Manage Your Facebook Page with Tools**. Access and optimize your Facebook Page directly, and/or use "Professional Dashboard," and/or "Meta Business Suite" to upload and schedule posts.

- ❑ **Brainstorm a Content Strategy.** Begin to systematically create blog posts, photos, videos, and other content that align with your marketing strategy and your target audience's interests. Encourage likes, comments, and shares by creating "man bites dog" content. Consider hosting Facebook Live broadcasts or setting up a company-specific, branded hashtag or Facebook group. Create posts, Reels, and/or Stories. Remember that the organic reach of reels, stories, and groups far exceeds that of traditional posts to your Facebook page.

- ❑ **Promote your Facebook page** via the real world, cross-promotion among Internet properties, and other free promotional tactics. Grow your Page likes.

- ❑ **Work with influencers, superfans, and groups.** To succeed on Facebook organically, you must cultivate superfans and possibly even nurture a "branded group."

- ❑ **Measure your Facebook results** using KPIs such as the growth of Page likes, the volume of interactivity of individual posts (e.g., likes, comments, and shares), and whether Facebook is generating traffic to your website up to and including 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 **https://jmlinks.com/smmdash**. Check out my continually updated post, "Facebook Technical Tips," at **https://jmlinks.com/74q,** which I use in my Stanford Continuing Studies class on social media marketing. The technical tips just keep coming!

»» DELIVERABLE: A FACEBOOK (ORGANIC) MARKETING PLAN

We've come to the end of our Chapter on Facebook, and your **DELIVERABLE** has arrived. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), and click on the link to the "Facebook (Organic) Marketing Plan." By completing this plan, you and your team will establish a clear vision of what you want to achieve through Facebook.

5
FACEBOOK (ADs)

"Meta" (which owns both Facebook and Instagram) is the largest social media *advertising* platform. Zuckerberg and his team know a great deal about your customers: their age, sex, geographic location, and (most importantly) their interests. Are they dog people or cat people? Are they getting married or ready to retire? Do they vote Blue or Red? Do they enjoy movies, and if so, which genres are their favorites? Eat vegan or love BBQ? The beauty of Meta advertising is its nuanced **targeting**: you can "slice and dice" your customer targets and reach those people most likely to be interested in your brand and buy your products. You can reach not only your existing customers but also new customers. You can even attempt to "poach" your competitors' customers! In this Chapter, we'll review paid advertising opportunities on Facebook and Instagram – since both are managed via "Meta," most of this applies to Instagram as well.

Let's get started!

TO-DO LIST:

- » Advertise on Facebook: Basics
- » Reverse Engineer Competitors and Companies-to-Emulate
- » Use Meta Ads Manager
- » Target Your Ads on Facebook: Audiences
- » The Meta Pixel, Conversion API, & Customer List
- » Advertise on Facebook: the Superfan Strategy
- » Measure Your Results
- »» Checklist: Facebook Ads Action Items
- »» Deliverable: a Facebook Advertising Plan

» ADVERTISE ON FACEBOOK: BASICS

Outside of Reels, Stories, or Facebook Groups, the "organic" or "free" reach of business Pages on Facebook is next to zero. The feed is more crowded than ever. People are more interested in the posts of their friends and families than in posts by

brands. The result is that nine times out of ten, you must **advertise** on Facebook to succeed.

Let me emphasize this:

> *For all intents and purposes, you MUST advertise as a brand to succeed at Facebook. The days of a truly "free" organic strategy on Facebook are over.*

Your Facebook Page won't promote itself. You must have a promotion strategy that combines free efforts, paid efforts, and hybrid pay-to-free efforts to get the word out. You can browse Meta's official information on advertising at **https://jmlinks.com/58u**, but let me walk you through the basic opportunities here.

Basic Ad Opportunities

First, log in to your business Page. On the left menu, look for "Ad Center" and click on that. Then click on "Advertise." This is the simplest entry point to advertising on Facebook, but it is not the only way. Here, you'll see:

> **Get started with Automated Ads** – this combines your input with AI to create ads.
>
> **Create a new ad –** this is a manual process for creating an ad.
>
> **Boost Facebook content** – this is "boosting" your existing content.
>
> **Boost Instagram content** – this is "boosting" your existing (Instagram) content.

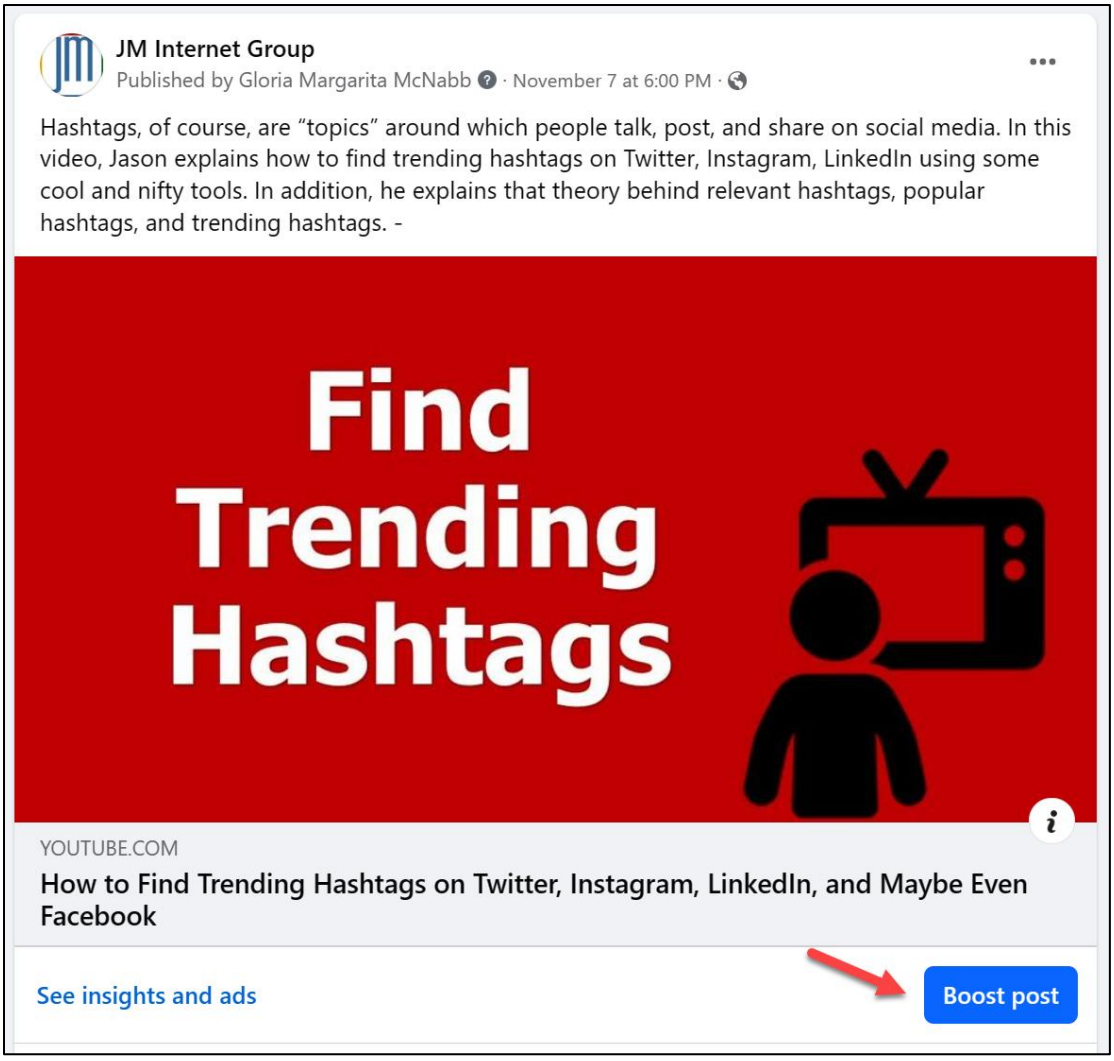
As we shall see, there is more than one way to access advertising on Facebook. Furthermore, not all features are available through each tool.

The Most Common Strategy: Boost a Post

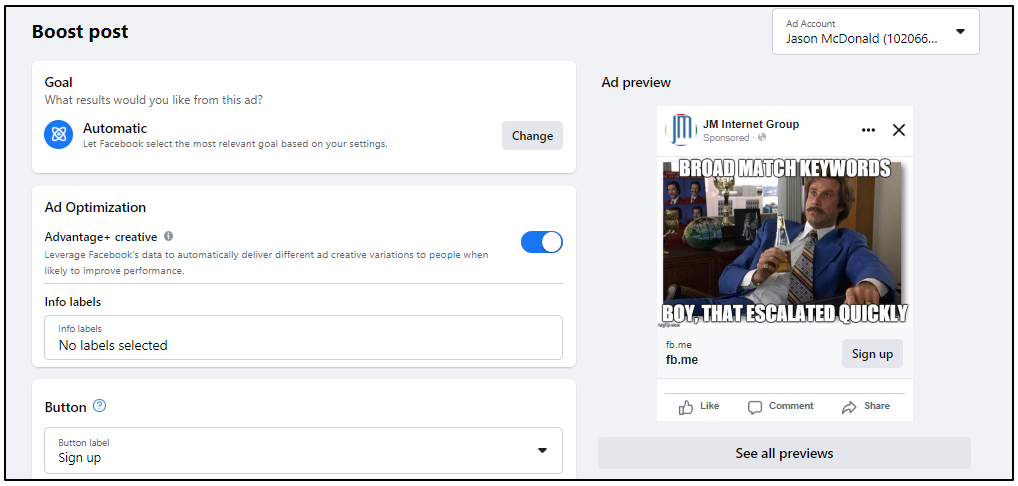
For now, let's assume you want to do the simplest thing, which is to boost a post of yours on Facebook to people who already like your Page. Boosting a post means paying Facebook to put your post at the top of the news feed; it's paying Facebook to prioritize your post in its algorithm so that customers and potential customers are likely to see it. Your goal is to get them to see your post, engage with your post, and hopefully "like" your business Facebook Page.

"Boosting a Post" is Paying Your Way into the Newsfeed

There are many ways to get to "Boost post." The easiest is from your Facebook Page. Make sure you are "logged in" as your Page (top right button). Then, find the post you want to boost and click "Boost post." Here's a screenshot:



Once you've clicked on the blue "Boost Post" button, you should see something like this:



We'll discuss targeting in detail below. For now, let's keep it simple. Your objective is to "boost" a post to reach people who already follow your Facebook Page. You are basically paying Facebook a fee so that your posts reach your existing customer base. Why? Because "organic" reach is so minimal, a little advertising/boosting of a post will go a long way toward making Facebook work for your business.

Here are some options:

Goal. Click on "goal," and you can deselect "automatic" (i.e., Facebook thinks for you). You can select from "get more messages" to "get more calls." If you're using a post mainly focused on your Facebook marketing, select "get more engagement" to push it to people who are likely to "like" your Page and its content.

Advantage+ creative. This option allows Facebook AI to create or assist in creating your ad text, images, and even video.

Button. Here, you can select from options such as "sign up" to "learn more." You can also create an intake form for webinars, lead generation, or service requests.

Audience. This controls the targeting options. For the simplest option, select "People who like your Page" or "People who like your page and people similar to them." Once you choose an option, you can set the geo-target, for example, as "People who like my Page" and are within 25 miles of San Jose, California.

> **Note**: If you do not see the option for "People who like your Page," this is usually because when you clicked "Boost Post," Facebook mistakenly

logged you out of your Page and into a different ad account. If so, look at the top RIGHT for "Ad Account." Ensure that you see the "Ad Account" that matches your Facebook page. If so, you should see the option "People who like your Page." Here's a screenshot:

Duration. Set a duration for your ad.

Total Budget. Set a budget.

Placements. Here, you can let Facebook select everything via "Advantage+ placements." You can also choose from Facebook, Instagram, and/or Messenger.

In our simple scenario, you are paying Facebook for "organic" reach. Thus, boost a post to either people who already follow your Page and/or people who are likely to do so. For a couple of hundred dollars per month, you can essentially retrieve much of the "organic" reach of your Business Page that has been lost due to changes on Facebook.

Basic Facebook Advertising: Boosting a Post and Targeting It

In summary, here are the steps to the simplest way to promote your Facebook content through advertising:

1. **Create a post** that has a brief headline or summary, a compelling image or video, and – if desired – a link to your website, blog, YouTube channel, e-commerce store, etc.
    a. Ensure that this post aligns with the culture of friends, family, photos, and fun.
    b. If possible, create a post that people are likely to engage with and even like, comment on, or share with their own friends and family.
2. **Boost this post** on Facebook to any combination of:

a. People who like your Page;

b. People who like your Page and people similar to them.

I recommend a minimum budget of $300 / month for your average small business, and for a larger company, the sky's the limit. **Note**: We will revisit targeting options as they are critical.

"BOOSTING A POST" IS PAY TO PLAY

So far, we are just boosting a post to our existing customer base, that is, "People who like your Page." This strategy means basically paying Facebook to increase your (organic) posts so that people who already like your Page can see them in their feed. Is this fair? No, it's not. It's Zuckerberg & Co. making you pay to reach your customers via the platform. Fair or not, however, it's a good, straightforward strategy to turbocharge your organic posts (that you've worked so hard to make), so that your existing customers actually see them.

» REVERSE ENGINEER COMPETITORS AND COMPANIES-TO-EMULATE

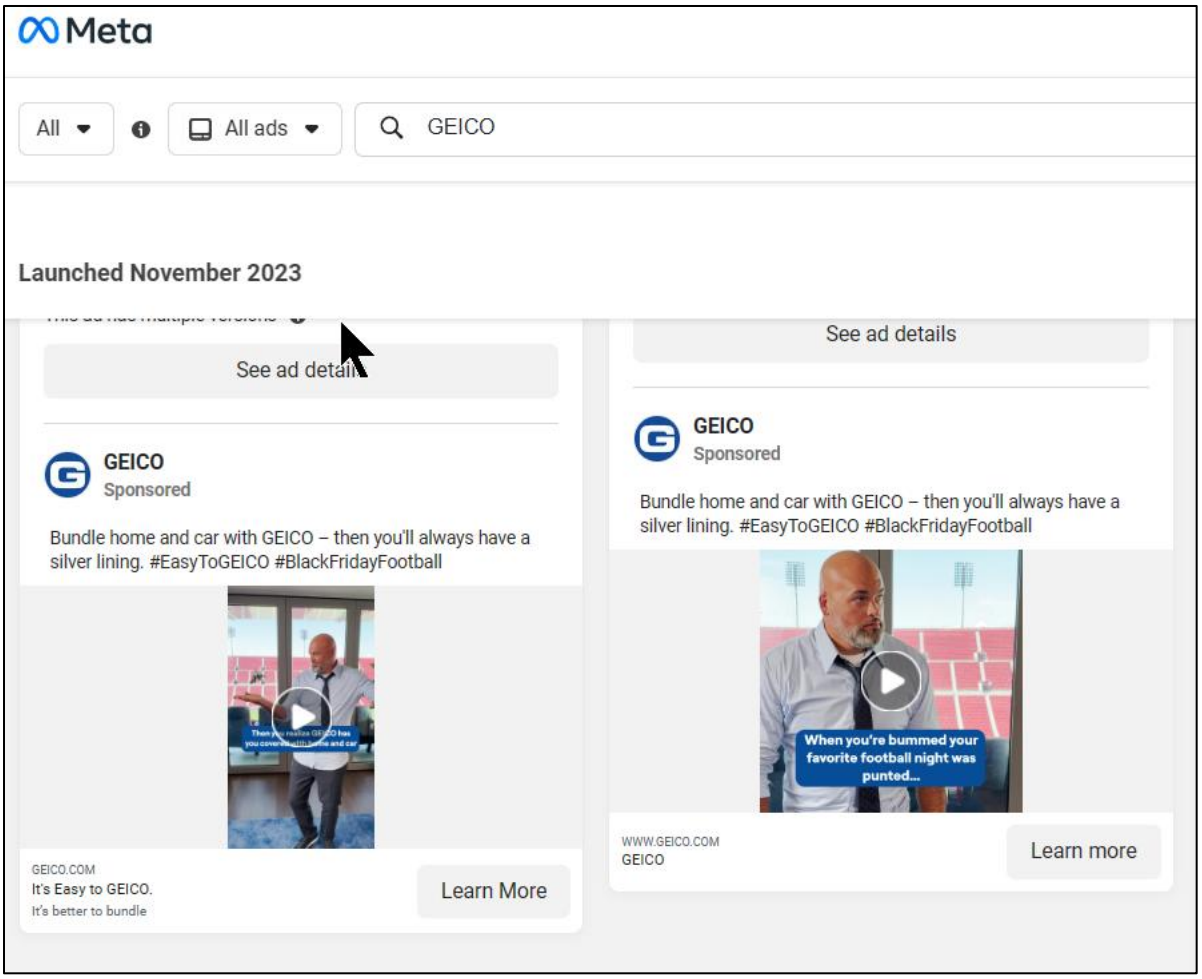
Advertising on Facebook, like all advertising, is about presenting your message to people who (hopefully) find it engaging. The worst ads are obnoxious and not relevant; for example, ads promoting "cat insurance" to people who have dogs, or even worse, to people who do not have pets, or even worse than that, to people who hate pets. The worst ads are annoying and intrusive. The best ads are well-targeted ("dog people see dog ads," "people with constipation see ads for laxatives," "couples who are engaged see ads for wedding rings," and so on). The best ads have a strong "hook" at the beginning – a textual or visual queue that this content is going to be relevant, engaging, and even fun. The best ads then deliver relevant, engaging, and even fun content that gets the person to take an action (such as clicking on a website to make a purchase or register for something "free"). The best ads "build your brand" to "sell more stuff." To this end, you might recall some famous Super Bowl ads that you really liked. (Indeed, go to YouTube and search for "Best Superbowl Commercials" for inspiration). Advertising, like all marketing, is a skill that you can learn, and the best way to begin is to "reverse engineer" what others are doing.

For relevant ads, go to your list of "competitors" and "companies-to-emulate." Meta has a nifty way to browse ads by companies. Here's how:

1. Go to the Facebook Page of a competitor or company-to-emulate (for example, Geico at **https://www.facebook.com/geico**).
2. Click on "About" and then find "Page Transparency." Open that window.
3. Scroll down until you find "Go to Ad Library." Click on this.

This will then take you to the hidden "Ad Library" on Facebook, where you can see ads running by this Page. You can also bookmark this URL (**https://www.facebook.com/ads/library/**) and search by company name or even keyword.

Here's a screenshot of ads running by Geico:



While you can't see impressions, clicks, and shares, you can read or watch each ad, and you can also click through to the landing page. It's a great way to brainstorm ideas for your own ads. (Alternatively, you can use a paid tool such as BigSpy (**https://bigspy.com/**), which tracks ads on Facebook, Instagram, and other social platforms.) In any event, your goal is to examine ads by competitors and companies to emulate for inspiration. I also recommend that you follow and engage with brands you like on Facebook, so that the algorithm shows you ads by these brands that you can "reverse engineer" for inspiration.

» USE META ADS MANAGER

Boosting a post is an easy way to advertise on Facebook. *Meta Ads Manager*, however, is a dashboard that allows you to manage all your ads in one place. It's a more robust interface than *Ad Center*. If you are serious about Facebook advertising, I highly recommend you use *Ads Manager*.

To access it, log in to your Facebook Business Page, then click "Ad Center," then scroll to the bottom and click on "Show more details in Ads Manager." You can also bookmark this URL: **https://adsmanager.facebook.com/**. Be careful, however, if you have more than one business Page or account. At the top pull-down menu, make sure you are in the *correct* business account. Additionally, be cautious when it comes to credit cards and billing. The platform has a tendency to default to your personal credit card. If you don't see "Campaigns," "Ad Sets," and "Ads," click on the left into the "Campaigns" icon to get to the right place.

Let's explain what this structure means:

> **Account**. This is at the top under the pull-down menu. This is the "owner" of the Ads Manager and is the "responsible party" who will pay the bill.
>
> **Campaign**. This is an umbrella bucket that contains ad sets and ads.
>
> **Ad Sets**. This is an umbrella bucket that contains the network (Facebook, Instagram, and/or Messenger), budget, and targeting settings.
>
> **Ads**. This is the ad creative, such as text, photos, and/or videos.

Thus, one Account can have multiple Campaigns, one Campaign can have multiple Ad Sets, and one Ad Set can have multiple ads. When you click "into" a Campaign, you'll immediately see the Ad Sets that live in that Campaign. When you click "into" and Ad Set, you'll see the ads that live in that Ad Set.

Ads Manager consolidates all your advertising in one dashboard, enabling you to view everything at once. It also allows you to create new ads, whether these are boosting existing posts or totally new ad content. An advantage here is that if you want to run an ad but do not want your existing followers to see it, you can set up an ad in Ads Manager (as opposed to boosting a post, where, by definition, everyone sees it).

> **VIDEO.** Watch a video tutorial on Meta Ads Manager at **https://jmlinks.com/76x**.

Inside Ads Manager, click on the "hamburger menu" ("All tools") on the left. This provides access to features such as billing, business settings, and page posts. You'll see:

Account Overview. Basic information on your Meta Ads account.

Campaigns. These are the "buckets" in which you put Ad Sets, Ads, and targeting (audiences) methods.

Ads Reporting. Data that shows which campaigns, ad sets, and ads are doing well and (hopefully) why.

Audiences. A place to put your targeting methodologies (discussed below), including "Custom," "Lookalike," and "Saved" audiences.

Advertising Settings. Account controls, Meta Verified, etc.

Billing and payments. Invoices, payments, and credit card records.

All Tools. The (somewhat redundant) complete list of everything available in Meta Ads Manager, including some key highlights -

> **Business Settings**. A way to jump to "Meta Business Manager" and see what and who can manage what.
>
> **Event Manager**. This is NOT "events," as in Facebook live events. Instead, this is where the nerds manage key computer/app "events," such as the Meta Pixel, and can sub-define "events," such as distinguishing between people who purchase and those who do not. (See discussion of Meta Pixel below).
>
> **Media Library**. A place to put all your ad creative, especially image and video assets.
>
> **Traffic analysis report**. Another way to Meta Business Manager, which takes you to the data report for traffic to your Facebook Page and offsite.

Commerce Manager. A segway to "stores" on Facebook and Instagram, either to set one up or manage your e-commerce on the platform.

You can read the Meta help file on Ads Manager at **https://jmlinks.com/73w**.

» TARGET YOUR ADS ON FACEBOOK: AUDIENCES

Targeting is the "secret sauce" of advertising on Facebook or Instagram. If you sell wedding dresses, you can target brides-to-be. If you sell dog toys, you can target dog owners and enthusiasts. And if you sell vacation cruises, you can target individuals who are considering a vacation. Targeting is where it's "at" on Facebook! As opposed to the standard terminology of "targeting" (as used by Google), Meta calls this function "audiences," as in the "audience" for a particular Campaign, Ad Set, or Ad.

Meta has a special area called "Audiences" where you can create, manage, and store "audiences" (that is, specific targets that you want to reference for your ads, as in "People who live in San Jose" or "People who live in San Jose and love dogs" or "People who have hit my website Pixel," etc.) You'd think that Facebook would make it easy to find "audiences," but you'd think wrong. Like much of the Meta interface for marketers, it's a disaster area of obfuscated complexity.

Here is one way to access all "Audiences:"

> Start at your Facebook Page and log in as your Page. Then click on "Advertise" at the bottom left. Then click on "Meta Business Suite," expand the Left Menu, and then find "All Tools." Scroll down until you see "Audiences" and click on it. Bookmark this, or save it to your Start.me page to get back to it.

You can also get to it from this URL - **https://adsmanager.facebook.com/adsmanager/audiences** - just be sure on the top left that the Pulldown Menu indicates the correct Ads Manager Account.

Once you've found audiences, you'll set up various "audiences," which are the parameters of people to whom you want to target ads. Then, when you Boost a Post or create an Ad in Ad Center, you'll look for your pre-created audience. You can also create an audience when you create an ad and then save it. It then "lives" permanently in "Audiences," where you can edit it.

Boosting a Post: an Important "Audience" Exception

This is true with an important exception. Three key options are ONLY visible from "Boost Post:"

> *People who like your Page*
>
> *People who like your Page and people similar to them*
>
> *People in your local area*

These three "audiences" can be accessed only if you boost a post. They are not visible in "Audiences," nor can they be edited or saved there. Yet these are valuable ways to pay a little money to Facebook to reach people who already like your Page, those similar to them, and/or those in your local business area.

If you're exasperated at this point, so am I. When I work with Meta Ads, I generally either pray a lot, take a lot of aspirin, engage in obsessive alcohol consumption, or some combination of all three. Just fight your way through Zuckerberg's jungle and remember what you are doing: targeting your ads to people "most likely" to be or become your customers. Remember that some targeting/audience functions are only visible under "Boost Post" and others under Audience. When creating an ad, you must "attach" it to the desired audience.

This is the key point:

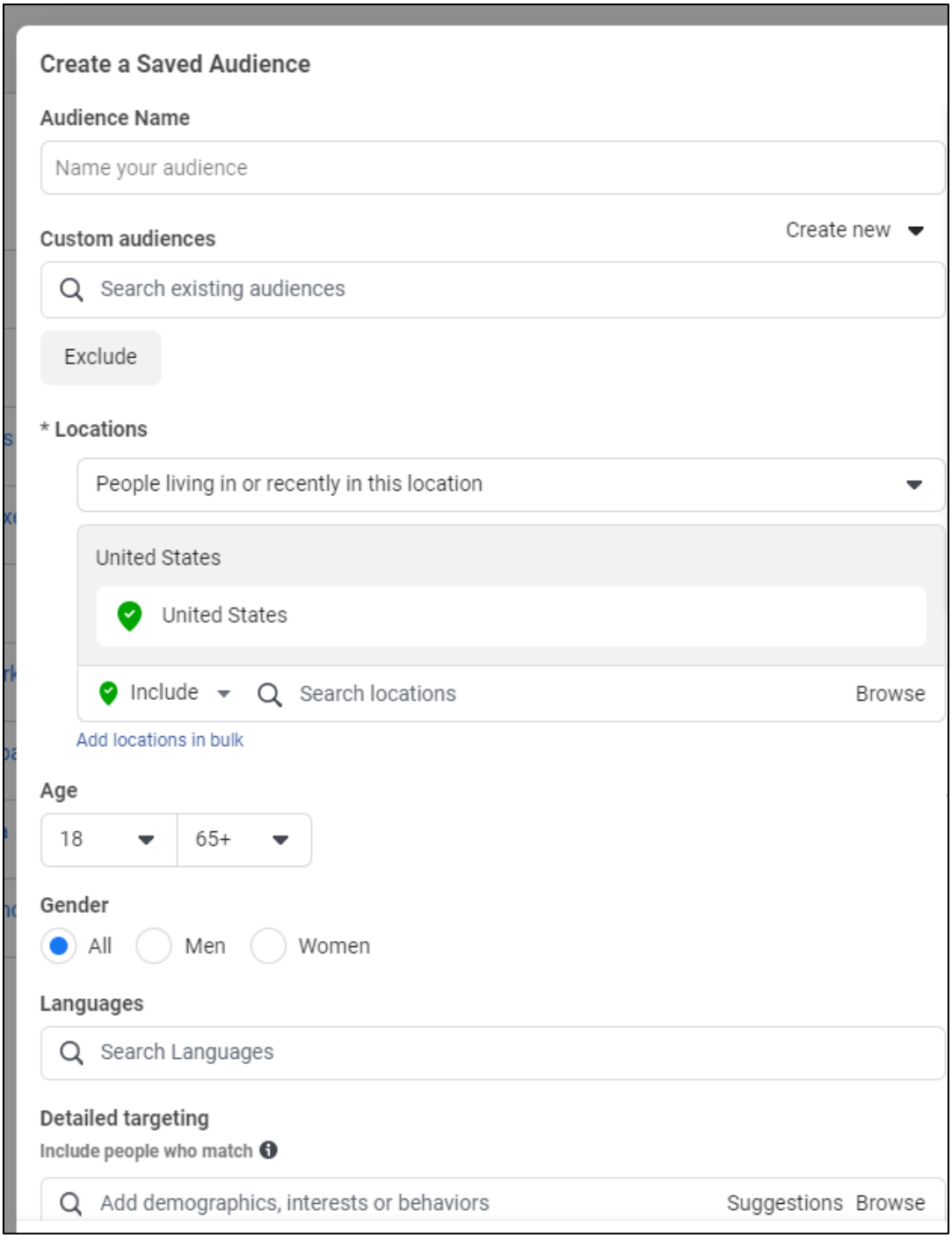
> *Ad Creative > attached to an "audience" = showing your ad to people most likely to engage with it.*

With that in mind, let's return to "Audiences." Hover over "Create Audience," and you'll see three options:

> **Custom Audience.** This is an audience of people who have interacted with your business, such as those who have visited your website or provided their email address.
>
> **Looklike Audience.** This allows Facebook AI to create an audience that "looks like" another audience, such as people who already like your Facebook page or those who have visited your website.

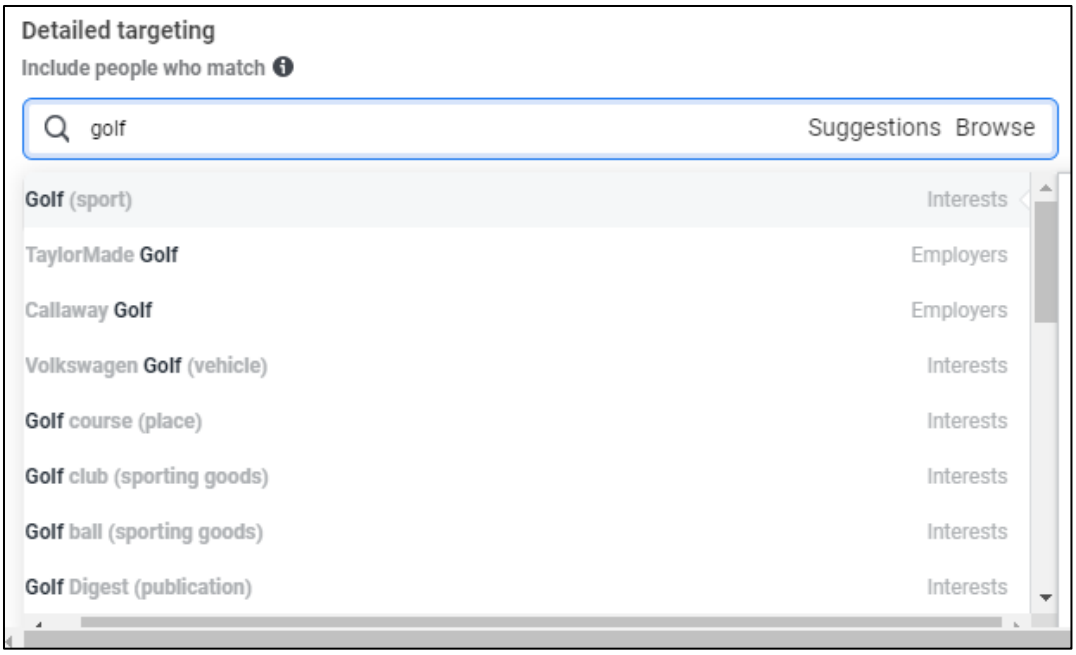
Saved Audience. This is using Facebook targeting, for example, "Women in San Jose who are considering marriage."

Let's start with the last one, first, "**Saved Audience**." Click "Saved Audience," and you'll see options like this:



Let's review these options. "Locations," of course, means selecting people who live in a country, state, city, or zip code. "Age" means their age. "Gender" means men or women. "Languages" means English, Spanish, German, etc.

"Detailed Targeting" is the most interesting aspect. Here, you can start typing a keyword like "wedding" or "golf," and Facebook will return interests that match. Here's a screenshot for "golf":



"Interests" means that they are interested in this keyword or topic. "Employers" refers to those who work for the entity on the left. As you select them, they are "expansive," meaning if you select "Golf" and then enter "Weddings," you'll get people who are interested in "golf" OR in "Weddings." Thus, the best practice is to be very narrow here and create a unique targeting group for each specific target. Thus, you can create a "Saved Audiences" of:

San Jose > 25-45 age > Men > Golf

United States > 45-65 age > Men or Women > Fishing

California > 45-55 > Women > Rodeo

The sky's the limit here. Once you create an audience, you can "attach" it to a Boost or to an ad in Ads Manager. So, your to-do is to brainstorm your most important audiences and create them.

You can also "narrow" your audience with exclusions. So you can have an audience of:

> *Texas > 25-45 > Men > Books > but not Rodeo*

To do this, click on "Ad Exclusions" at the bottom. You can also do Boolean "Ands" by clicking "Must also match," as in women who are "getting married" and "like rodeo." And finally, you can browse categories by clicking "Browse."

"Browse" provides demographics, interests, and behaviors, which are broad categories. For example, you can select *Demographics > Education Level > College Grad.* Again, you can mix and match these characteristics with others to find Texas college graduates between the ages of 25 and 45 who are men who enjoy *books but not rodeo*. Just be aware that if your targeting is too narrow, Facebook may not run your ads.

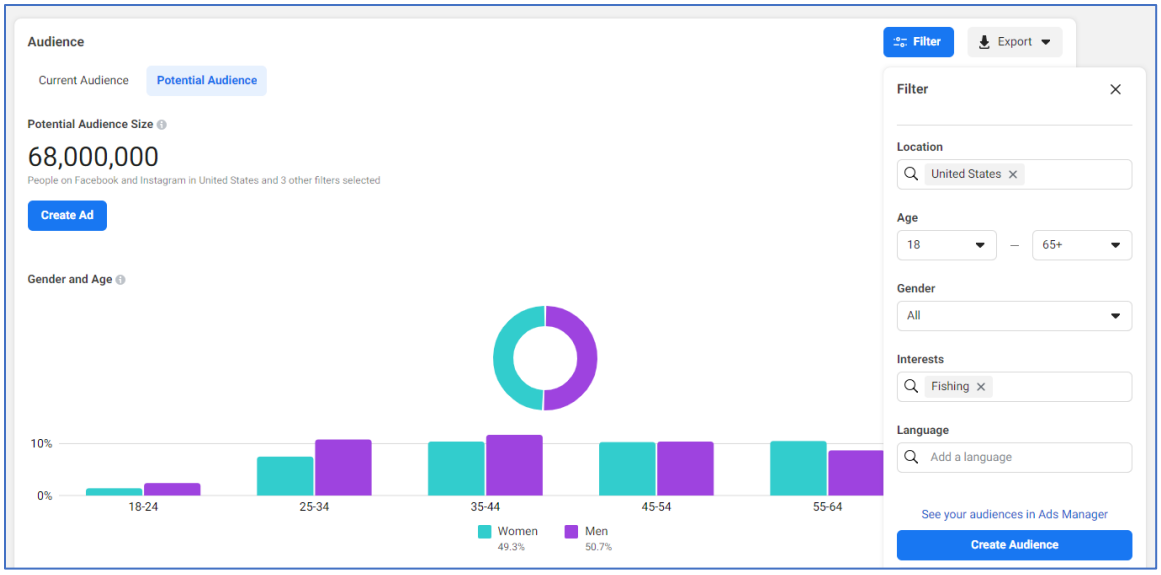
Once you create and save an audience, it will be visible as an audience when you "Boost a post" or create an Ad Set in Ads Manager.

> **AI PROMPT.** Explain to ChatGPT the basics of your target buyer personas. Next, prompt it to help define your "best" Facebook audience that might convert as follows: "Taking what you know about our target buyer personas, please give me five parameters that I can input into Facebook saved audiences so that I am laser-focused on these target buyers."

Audience Insights: How Big is an Audience?

Here's a pro tip. You can dig deeper into Audiences via the "Audience Insights" tool on Facebook at **https://jmlinks.com/54x**. It's not immediately apparent in the interface, but it can be accessed with some effort. Open your business Facebook Page and on the left menu select "Meta Business Suite." Then click "Insights" and then click "Audience." Next, click "Potential audience" and then "Filter." You can then filter for geographic, demographic, and interest attributes to estimate the size of a given audience.

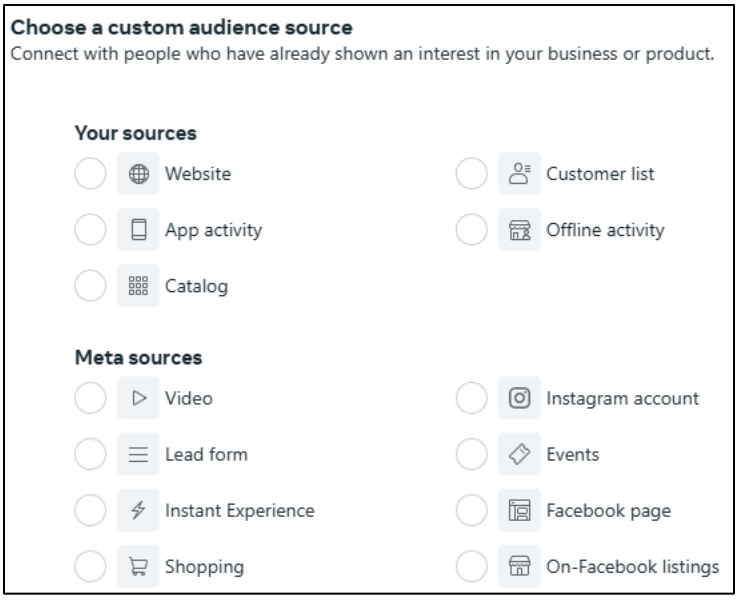
You can then see how big an audience is and the breakdowns by gender and age. Here's a screenshot for *United States > fishing*, showing an audience size of 68 million people:



You can thus create audiences and save them to your Facebook Ads Manager account. Then, when you Boost a post, these audiences become accessible. You should pre-define your target buyer persona, for example, as "families with young kids in San Jose," or "People who like Whole Foods Market in Dallas," etc.

» The Meta Pixel, Conversion API, and Customer List

The next type of audience to consider is a "Custom Audience." "Custom Audience" refers to individuals who have interacted with your business in some way, whether directly on Facebook (or Instagram), on your website, or by providing you with their email address. Facebook allows you to "snoop" on your customers and then use this data to target/retarget/remarket to them on Facebook, plus share data on whether they "convert" once they leave Facebook and visit your website. Here's a screenshot of available options:



"Customer list," for example, means you upload a list of all your customers' email addresses and then Facebook matches them as an audience against which you can show ads. All of this falls under the topic of "Remarketing" (which also exists on Google and via ad networks such as AdRoll (**https://adroll.com/**). "Remarketing" means showing your ads to people who have already interacted with your business. For example, a person who has visited your website can then be shown Facebook ads when they are on Facebook.

Remarketing can also employ very detailed targeting – as in showing one ad to people who have made a purchase, another advertisement to people who have visited your website (but not made a purchase), and still another ad to people in Cleveland, who visited your website and purchased red sneakers but not a blue dress. You can review the Meta help file on "retargeting" at **https://jmlinks.com/76y**.

Let's review the technical aspects.

The Meta Pixel

The **Meta Pixel** is a tracking system deployed by Facebook across the Internet. Basically, you – as a website owner – add the "Facebook Pixel" to your web server. Note: the "Facebook Pixel" was the original name, and the "new" name is the "Meta Pixel."

The Pixel enables Meta to combine the data it already knows about a person, via Facebook and/or Instagram, with the data it collects on your website through the Pixel. See **https://jmlinks.com/43c** for complete information on the Pixel. If you're

running WordPress on your website, you can download and install the "Pixel Cat" plugin, which makes it relatively easy to install the Meta Pixel on your website. Just search for "Pixel Cat" as a plugin when logged in to your WordPress website, or visit **https://jmlinks.com/43s**. If you're running Google Tag Manager, it can also be done via Google Tag Manager (**https://jmlinks.com/58x**).

Once installed, the Pixel can be used to create a **custom audience**. Broadly, you can create an audience of everyone who hit your website; more narrowly, you can create sub-audiences, such as an audience of persons who hit your website but did not convert or persons who hit specific pages or sections (such as men's clothes, women's clothes, or teenagers' clothes if you were an e-commerce clothing vendor, for instance). You can then use these audiences and sub-audiences to target your ads on Facebook. An e-commerce site that sold jet skis, for example, could target all website visitors with ads on Facebook or, more cleverly, target only those visitors who did not convert and buy a jet ski. A clothing store could target ads to men, women, and teenagers separately, and so on. You can also assume that folks who hit your website are good prospects to like your Facebook Page, so you can use the Pixel to grow likes to your Facebook Page, and then boost posts and set up other types of Facebook ads so that your website grows your Facebook Page. Your Facebook Page helps grow your website and drive desired actions, such as selling products on an e-commerce store or collecting web feedback forms.

The Pixel, in short, unifies your website with your Facebook Page.

Installing and setting up the Pixel, however, is not an easy task. It's something designed by computer geeks, for computer geeks. You may need to contact a technical webmaster for assistance with installation and conversion issues. You can also go to Fiverr (**https://www.fiverr.com/**) and search "Meta Pixel" to find experts who can install the Pixel technology for you.

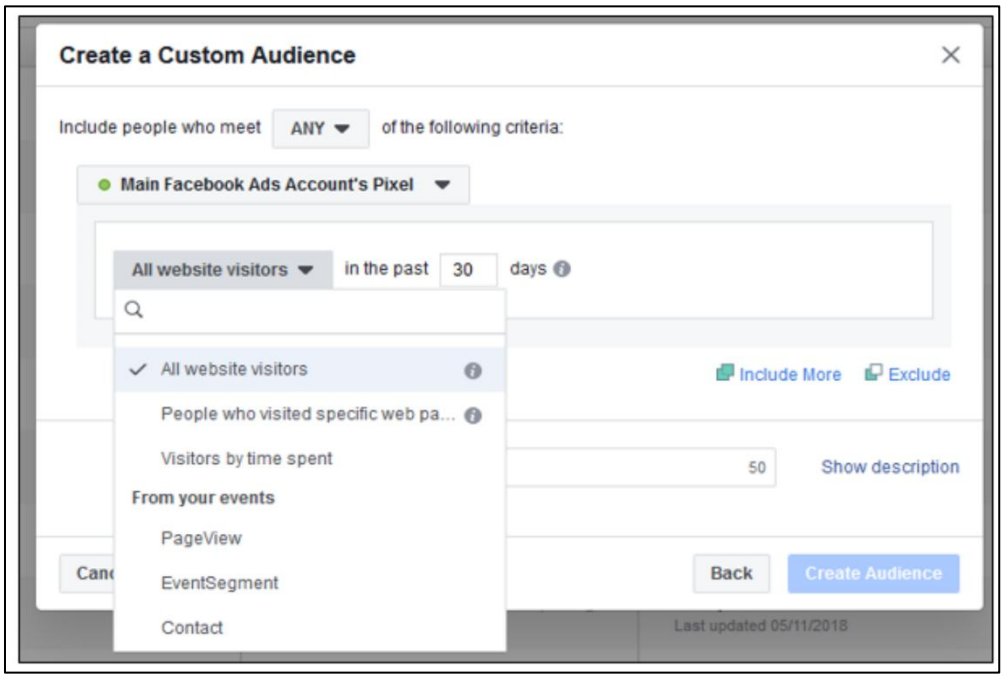
Once the Pixel is installed, it may take about 14 days to collect enough data. If you have a large website with a high volume of traffic, it can be faster. If your website doesn't have a lot of traffic, however, the Pixel might not work at all. You need approximately 20,000 visits per month to your website for it to function effectively. We'll assume you've installed the Pixel and have enough website visitors for it to work.

It's going to get complicated at this point. Bear with me and be patient. Meta's advertising platform is quite complex, with sparse support files and no phone support available. But it's worth slogging through the pixel installation and then creating custom audiences to take advantage of this incredible way to target customers!

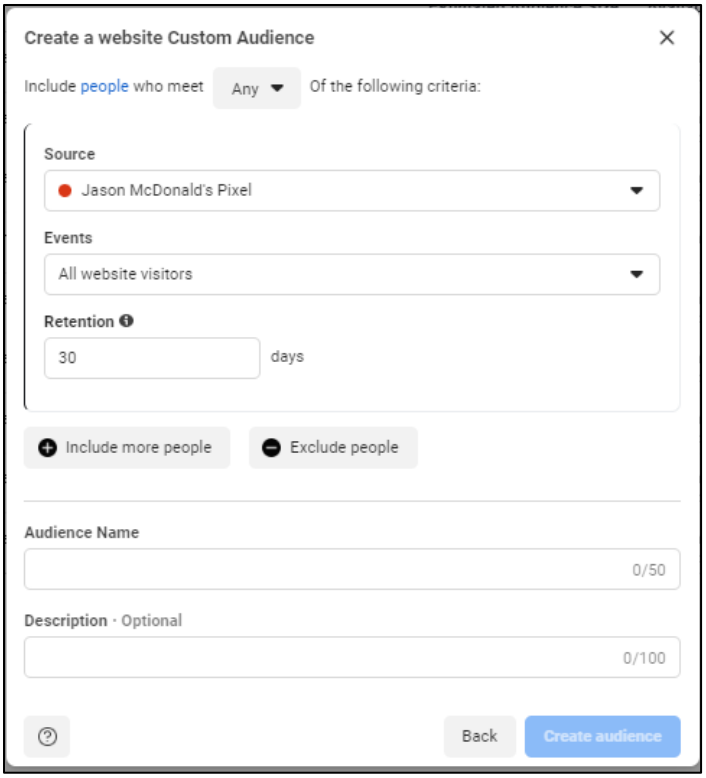
Here's how to create a Custom Audience using the Facebook Pixel. First, you need to get back to "Audiences" (**https://jmlinks.com/73u**) as explained above.

Then -

1. Click the blue "Create Audience" and select "Custom Audience."
2. Click "Website" under "Your sources." Under "Source," you should now see your "Pixel."
3. Follow the steps there, as you should see your website visitors and options, such as visits to a specific page or conversions. Here's a screenshot:



Once you've installed and set up the Meta Pixel, you can further refine your targeting by creating sub-audiences. Here's a screenshot:



Once you've done this, you should start to see your Pixel audience available when you boost a post, advertise your page, or promote your website via Facebook advertising. Note, also, underneath your pixel, you will see "Include more people" and "Exclude people" – these are the ways that you can do "Boolean" searches, as, for example:

People who hit my website but did not make a purchase.

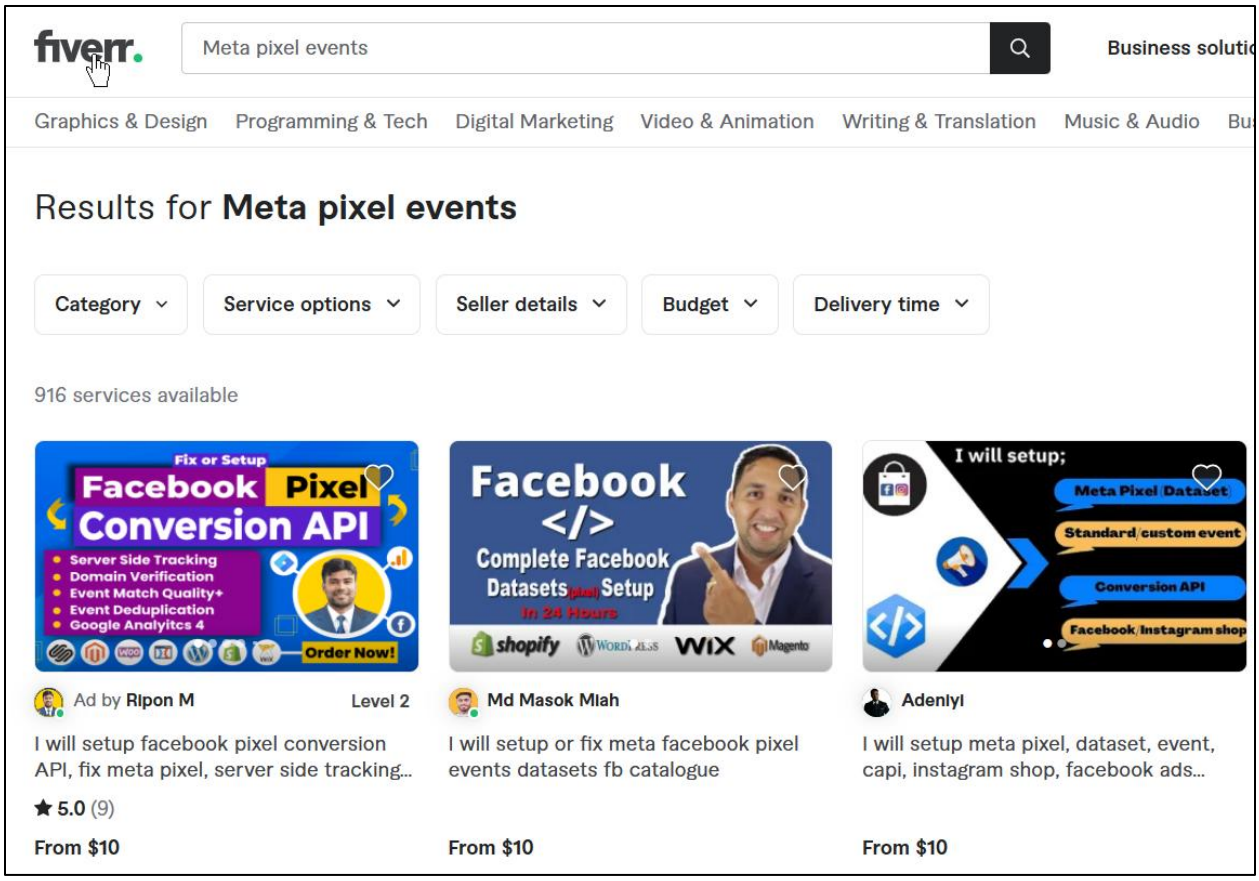
People who hit my website who live in Cleveland, Ohio

People who hit my website, did not make a purchase, but like cats

Etc.

In Meta language, these are called "Events." You may need to find a computer nerd to create specific event parameters (e.g., people who made a purchase of a "red dress" vs. those who purchased nothing). These are located under "Event Manager via Ads Manager."

You might visit Fiverr or another programmer site and look for a skilled expert who can create "events" using the Meta pixel. Here's a screenshot from Fiverr.com as to "Meta pixel events":

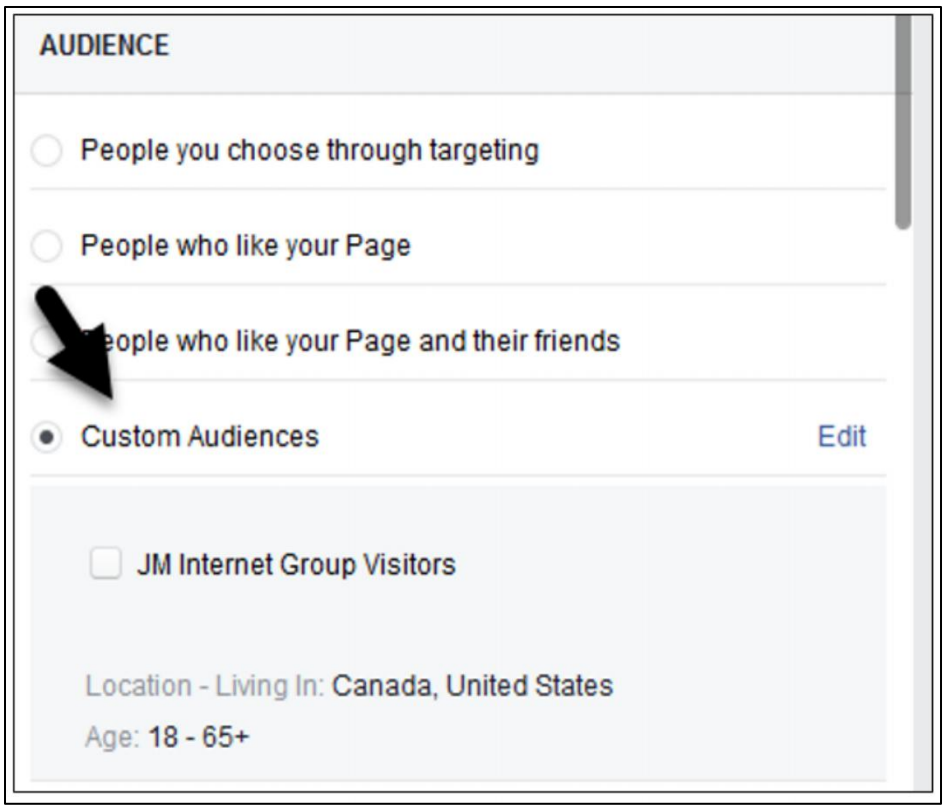


Obviously, be cautious when hiring external consultants – check references, supervise their use of passwords, etc. However, setting up the Meta Pixel is somewhat complicated, and it makes sense to find a technical expert.

In summary, your steps are:

1. Install the Meta Pixel on your website.
2. If desired, modify the Pixel to track visits to key web pages and/or conversions on an e-commerce or lead generation site.
3. Log in to Facebook and get to the "Audiences" section in Facebook Ads Manager.
4. Define a "custom audience" based on your Facebook Pixel (all website visitors) or a sub audiences (non-converters, visitors to key pages, etc.).

Once defined, you can then use and reuse your Facebook Pixel as a "custom audience" to boost a post, advertise your page, or advertise a link to your website. You can also "slice and dice" your Facebook Pixel (the total audience) into many subaudiences. You may have to click on "Custom Audiences" to see it. Here's a screenshot:



Once you've installed the Pixel, you can laser-target people who hit your website with Facebook or Instagram ads. People who have visited your website are the most likely to become your superfans, make a purchase, request more information, and so on.

Installing the Meta Pixel is a fight worth winning!

Learn more about using events and the pixel at **https://jmlinks.com/57h**.

The Pixel is Dying (at Least on Apple iPhones)

Now that you've mastered the Pixel, here's some fun news. Due to changes at Apple, the Pixel is dying and being replaced by CAPI (Conversions API). You'll want to install both the Pixel AND the CAPI technology.

In a nutshell, Apple is not cooperating with Pixel tracking technology, and users must now "opt in" to being tracked. Even worse, "cookies" are being slowly discontinued across the Internet. This is called the "Post Cookie World" or "Cookieless Future." These are humorous terms that indicate it is becoming increasingly difficult to track users across the Internet. The "Pixel" is already dead on Apple iPhones, and it appears to be on its way to being dead on Android phones soon. Even on the desktop, talk of the "death of cookies" means the "death of the Pixel." For now, it remains active on the desktop and, to some extent, on Android phones.

These looming changes are already having a substantial negative impact on Facebook Pixel tracking. You can read more about targeting folks using Apple iPhones on Meta at **https://jmlinks.com/57e**.

Facebook Conversions API ("CAPI")

As the Pixel fades into oblivion, Facebook has struck back against Apple's privacy initiative with CAPI: the Facebook Conversion API. CAPI is quite technical, so I recommend you find a "computer geek" who works with your website to enable this feature. CAPI essentially sends data from your website directly to Facebook, and Facebook matches this data to its existing user information. *Take that, Apple!*

The good news is that many major e-commerce platforms, such as Shopify, now support CAPI integration.

Here are the steps:

1. **Install the Conversion API on your website**. This can be done through "partner" e-commerce platforms such as Shopify, WooCommerce, or Wix, OR through direct installation on your website OR through third parties such as Google Tag Manager.
2. **Verify the installation**. Ensure that data is flowing between your website and Facebook/Instagram. You can see this data in Facebook under "Audiences."
3. **Define "events" to slice and dice your audience**. For example, separate people who "made a purchase" from people who did not." This may require a computer geek to set up.
4. Use this data to **set up "custom audiences"** on Facebook.

Facebook strongly recommends that you install both the Pixel and the CAPI, as they are combined to track user behavior. You can read more about CAPI at **https://jmlinks.com/57f**. If you're on Shopify, check out their help file at **https://jmlinks.com/58w** or Google your platform plus "Facebook Conversion API" ("CAPI") as in "WooCommerce Facebook Conversion API" to find the latest help files. Remember: if you "know" the question ("How do I install Meta CAPI on Shopify?"), You can Google, YouTube, or ChatGPT to find the answer, or you can go to Fiverr and hire someone to implement it for you.

Customer List and Other Options

A third advanced targeting technique is called "Customer List." Here, you upload a list of customer email addresses, and Facebook matches its own massive list of user emails against your list to create a custom audience based on your email list. Here's how.

1. Log in to your *Facebook Page* > *Ads Manager* > *Audiences*.
    a. Be sure to click over to *Assets* > *Audiences*, which should get you to **https://adsmanager.facebook.com/adsmanager/audiences**.
2. Click the blue "Create Audience" and select "Custom Audience." (You may be prompted to upgrade to Facebook Business Manager).
3. Select "Customer List."
4. Then, either add customers by uploading a customer email list directly or, if you are using MailChimp, follow the instructions provided there.

Ultimately, all of them live under the "Audience Tab" in Meta Ad Manager, whether these are "saved" or "custom" audiences. Please note that Meta refers to them as *audiences*, *saved audiences*, and *custom audiences*.

"Lookalike" Audiences: Facebook AI at Work

Finally, you can create a "Lookalike Audience," which means Facebook will examine your Facebook Page, Facebook Pixel, and/or CAPI data, or other datasets, and attempt, through the power of artificial intelligence (AI), to create an audience of similarly minded people. To create a "Lookalike Audience," get to Audience Manager as described above. Then,

1. Click the blue "Create Audience" button and then "Lookalike Audience."
2. In the pull-down under Source, select either your Facebook Page or your Facebook Pixel audience.
3. Select a location such as Texas or Oklahoma. It needs to be pretty big, as this won't generally work for a city or a zip code. But you can experiment.

Once created, your Lookalike audience will appear named "Lookalike – People who…" when you target an ad. A "Lookalike audience" essentially uses Facebook to mimic the characteristics of people who either visit your website or have already liked your Facebook Page.

» ADVERTISE ON FACEBOOK THE SUPERFAN STRATEGY

The organic reach of your Facebook Page isn't powerful compared with the reach of fans and superfans. One solution is raw advertising, as discussed above. But there's another way: a hybrid between organic reach and raw advertising.

I call this the "**Superfan strategy**."

You can "use" your fans, superfans, and influencers to broaden your reach on Facebook. Fans, of course, are people who have liked your Page, and superfans are those who have liked your Page and are highly engaged with your brand. Influencers are those who have a vast and engaged audience themselves.

Think of targeting fans, superfans, and even influencers with your content via advertising, and then make this content so engaging that **they want to share it** with their audience. The Superfan Strategy involves targeting advertising to reach fans, superfans, and influencers, and utilizing "content marketing" to create content that is more likely to be shared.

Here's how to do this:

1. Create a piece of **compelling content**, such as a highly emotional post, features a great image, and conveys a message that aligns with your brand, such as a contest, giveaway, sentimental or shocking message, or something counterintuitive.
2. **Boost** this **post**.
3. Select the option "**People who like your Page**."

Because people who already like your Page are – by definition – fans and superfans, you can use advertising to reach them, and then, because you've created compelling and shareable content, get them to share this content with their friends and family. Alternatively, you can create a "saved audience" of influencers, such as those from the New York Times, Huffington Post, and Newsweek – specifically, journalists and bloggers.

This is how content gets started in the sharing process on Facebook and indeed, how a lot of content "goes viral." It's promoted through advertising to fans, superfans, and influencers from the outset.

For example, here's a post by REI entitled, "OptOutside," building on their phenomenally successful campaign to close their doors on "Black Friday" and encourage people to "opt-out" of the mass consumerism that hits our country on the day after Thanksgiving:

Notice how this has 2400 likes, 138 comments, and 68 shares. Most likely behind the scenes, there was an initial advertising push to get this post out in front of REI's fans and superfans. Notice also that the content aligns with their brand identity as a somewhat anti-consumerist brand that encourages nature, is a bit of a "humble brag,"

and leverages their superfans' sense of superiority over the shoppers who flock to mega stores on Black Friday. If you're cynical, you could even say that many people will "virtue signal" their support of *#optoutside* by liking, commenting, and even sharing this type of content.

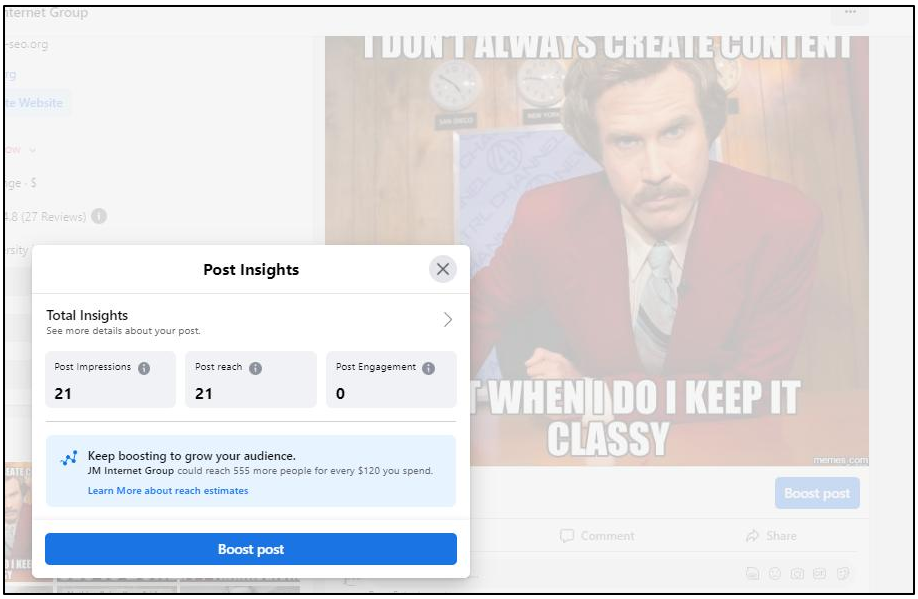
REI is using great content that supports its brand and is highly shareable in combination with advertising to create a post that "goes viral." REI is leveraging fans and superfans (plus their motivation to "support" a cause) to promote its message through Facebook.

So, it's not just advertising or organic reach on Facebook; it's advertising and organic reach, using the latter to amplify the former.

» MEASURE YOUR RESULTS

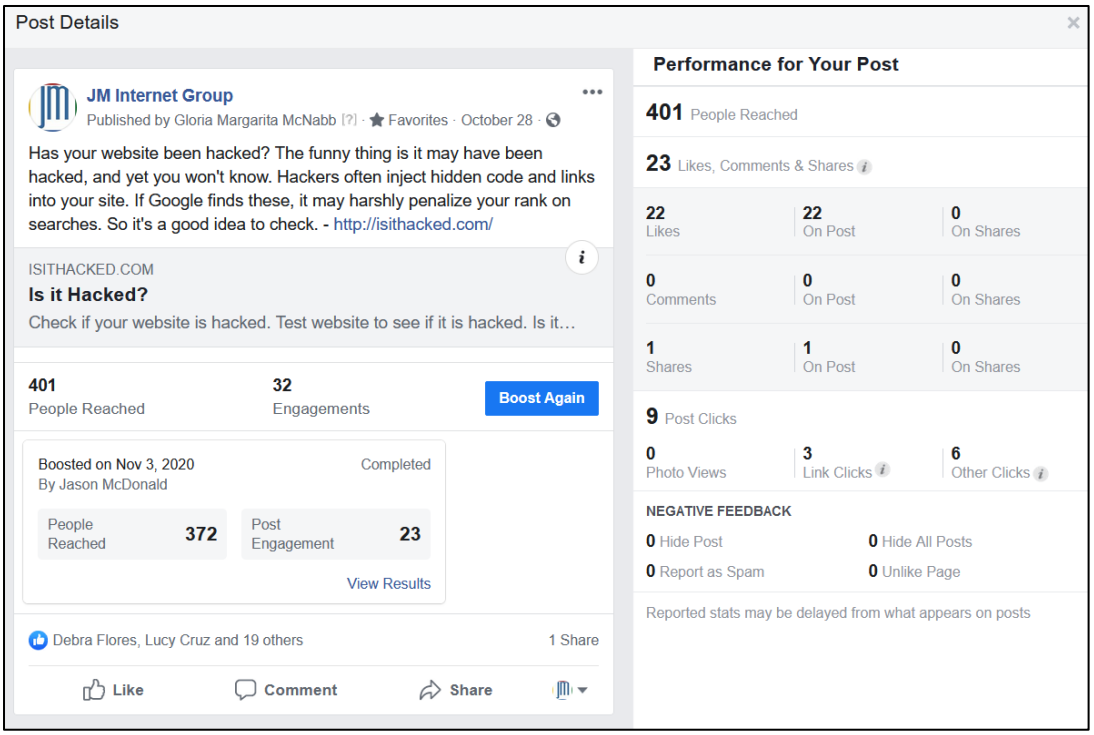
Facebook provides valuable metrics for your organic and advertising efforts. Log in to your Facebook Page, and then click on the "Insights" tab on the left menu. This allows you to access the *Professional Dashboard* > *Insights* data. Here, you'll find an overview of your Facebook activity and a post-by-post 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 then "See insights and ads," and a pop-up window will give you drill-down information. Here's a screenshot of a post to the JM Internet Group Facebook Page:



The data shows you how many people engaged with the post and how (in terms of likes, comments, and shares).

And here's a screenshot of a post of content that was boosted:

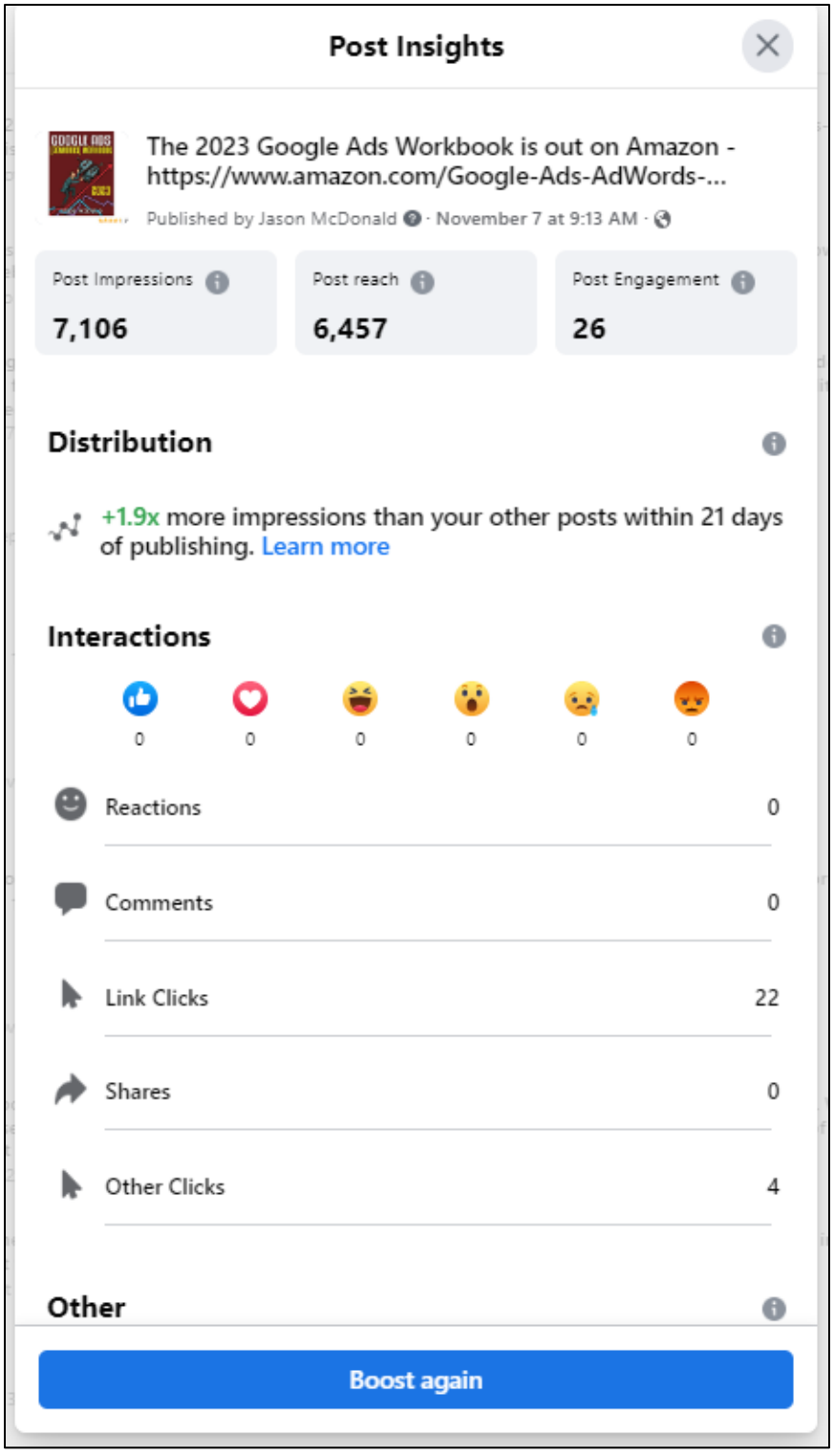


Pay attention to the *reach*, *likes*, *comments*, *shares*, and *clicks* of all your posts (both organic and advertised). All of this influences the *Facebook algorithm score* of your Page. The *more interactive* your Page and posts are, the *higher* your reach, and the *higher* your reach, the *more*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

You'll also very clearly see that posts that are "boosted," that are supported by advertising, have a much bigger reach and, therefore, a bigger opportunity for likes, comments, and shares vs. posts that rely on free, organic reach.

You can also hover over the comments and shares with your mouse to see who did what and even "invite them" to like your Facebook Page.

Returning to your "Professional Dashboard," you can click down on Your Page, Posts, and/or Audience to see more detailed data on engagements. Here, again, under Posts, you can see detailed information on the engagement of an individual post. Here's a screenshot:



Obviously, "boosted" or "advertised" posts will get more engagement.

All in all, Facebook provides excellent insights into who is interacting with your posts and Page. Use this information to continually improve your Page, as measured by posts that garner more likes, comments, and shares.

»» CHECKLIST: FACEBOOK ADS ACTION ITEMS

Test your knowledge of Facebook! Take the *Facebook marketing quiz* at **https://jmlinks.com/qzfb**. (Before or after you do, check out the free, official Facebook learning site called "Blueprint" at **https://jmlinks.com/53e**.) Next, here are your Facebook (Ads) **Action Items**:

- ❑ **Master "Boosting" A Post**. Identify posts that are likely to have high engagement and "boost" them to people who already like your Facebook Page. This is the most straightforward and most basic Facebook ads strategy.
- ❑ **Brainstorm a Content Strategy.** Ads that perform well on Facebook typically feature images and videos, often including "high engagement" types of content such as humor, emotion, and over-the-top photos or videos. Thus, brainstorm the types of ad format, content, and offers that are most likely to spur engagement as measured by likes, comments, and (most importantly) shares. Be sure to "reverse engineer" competitors and companies-to-emulate.
- ❑ **Understand Facebook Saved Audiences.** Ensure you understand the distinctions between a "saved" audience, a "custom" audience, and a "lookalike" audience. Start with "Saved" audiences as the easiest way to "slice and dice" potential customers on Facebook.
- ❑ **Set up Facebook (Custom) Audiences.** Set up and save custom audiences on Facebook, including Meta Pixel audiences, CAPI audiences, and audiences from email lists. Verify that your installation is correct and consider further audience segmentation, such as separating "customers" from "non-customers."
- ❑ **Master Targeting on Facebook Ads.** Use your existing Page followers, "Saved" audiences, "Custom Audiences," and "Lookalike Audiences" to target the right ad to the right person at the right time.
- ❑ **Measure your Facebook results** using KPIs such as the growth of Page likes, the volume of interactivity of individual posts (e.g., likes, comments, and shares), and whether Facebook is generating traffic to your website up to and including 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 **https://jmlinks.com/smmdash**.

»» DELIVERABLE: A FACEBOOK ADS PLAN

We've come to the end of our Chapter on Facebook, and your **DELIVERABLE** has arrived. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), and click on the link to the "Facebook Ads Plan." By completing this plan, you and your team will establish a clear vision of what you want to achieve through Facebook ads.

6
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*. For example, compare what happens on LinkedIn with real-world events, such as the annual *Consumer Electronics Show* in Las Vegas. These industry conference "parties" feature free food and entertainment, a speech or two by prominent CEOs, plus lots of *business networking* between vendors and potential customers. Breakout sessions enable individuals to acquire new skills and stay current with industry trends. People are dressed in "business casual," "ready to learn," and "ready to network" attire for their companies and careers. LinkedIn takes these activities and moves the "professional party" online.

Besides **business networking**, LinkedIn is also heavily used for recruiting and job searching. However, due to our focus on marketing, we will ignore that important activity. Instead, this Chapter focuses on **how to market a business on LinkedIn**, specifically the three big opportunities: 1) helping employees optimize their **profiles**, 2) using LinkedIn to **network** with customers and prospects, and 3) leveraging a **company page** for your business. We'll also discuss the basics of **advertising** on LinkedIn.

Let's get started!

TO-DO LIST:

- » Explore How LinkedIn Works
- » Optimize Your LinkedIn Profile (and Your Employees', Too)
- » Schmooze on LinkedIn: Your Social Rolodex
- » Be Active on LinkedIn: Posts, Articles, and Video
- » Be Active on LinkedIn: Connections, Comments, 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 serve as online resumes that list their 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 in 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.** Groups on LinkedIn are a significant marketing opportunity! 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.** Companies create business Pages on LinkedIn. The good news is that the "organic reach" of Pages on LinkedIn is quite a bit better than that on Facebook. Individuals can follow companies, and by doing so, they give permission for that company to communicate with them. 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 on their LinkedIn profile, or a company shares a post on its LinkedIn Page, those posts appear in the news feed of connected individuals. Like Facebook, LinkedIn 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.* It is also similar in content: people post just text, text with a photo or image, text with a link to a blog or website, and/or native video. For an official video introduction to LinkedIn, check out their course, "Learn LinkedIn," at **https://jmlinks.com/73x**.

A More Business-Oriented Culture

The **culture** of LinkedIn, however, is more professional and business-oriented than that of Facebook. On LinkedIn, people are in "learning" and "business mode," sharing information and posts about business trends and topics, rather than the latest photo of their baby, a cat video, or a viral SNL skit. Common LinkedIn posts typically cover industry news, job promotions, corporate webinars, or commentary on business and national news. Content marketing for your business on LinkedIn thus needs to fit the business- and career-oriented themes of the network.

The **structural** similarities between LinkedIn and Facebook hide a very different **pattern of interaction**. On Facebook, the center of marketing is the *business page*, and on LinkedIn, the center of gravity lies with the personal *profiles* of employees. On Facebook, customers primarily interact with business pages for marketing purposes, while on LinkedIn, they primarily interact with *employees* of various businesses. Ironically, marketing on LinkedIn thus centers on *persons* (i.e., your employees), while marketing on Facebook centers on *brands* (i.e., your company page).

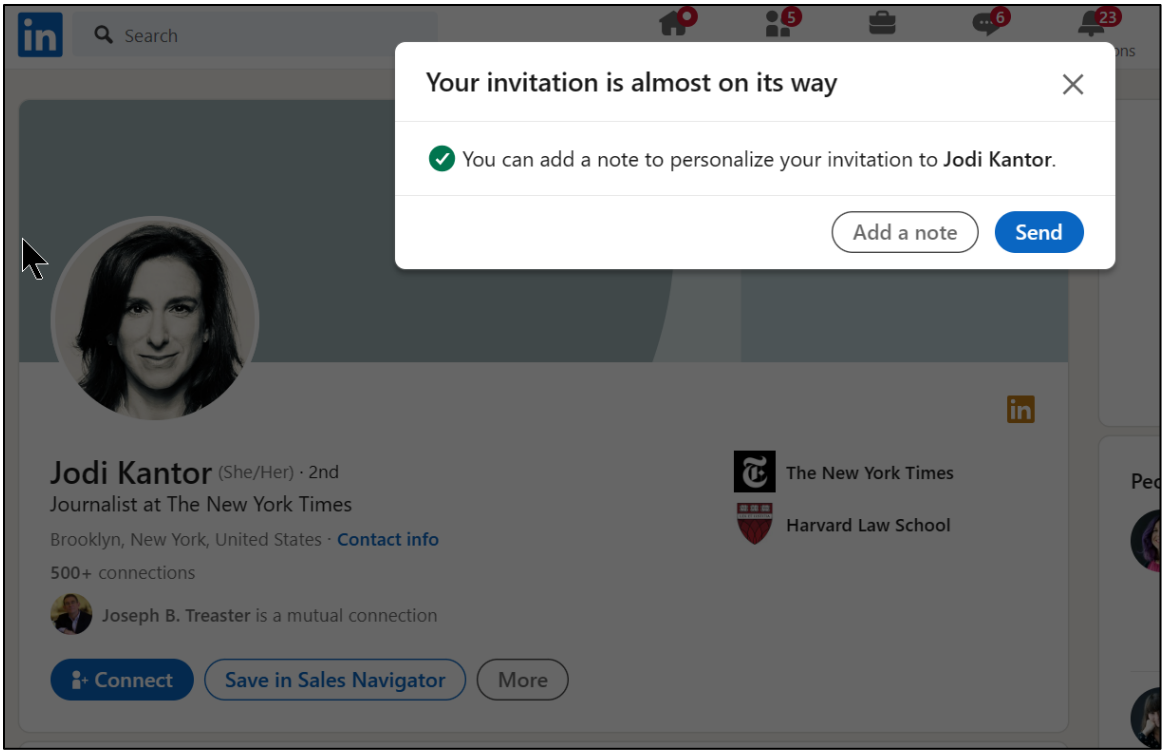
LINKEDIN'S CENTER OF GRAVITY IS THE PERSONAL PROFILE

LinkedIn's center of gravity, in summary, is *person-to-person interaction*. This makes sense when comparing a company picnic (Facebook) with a business networking event (LinkedIn). Whereas at the former, you interact with the company (the entity that brings the food and entertainment and pays for the party), at the latter, you interact with the company's employees, discussing industry events and socializing about shared interests. In a business environment, you don't network with *companies*, after all. You network with the *individual employees* of a given company. Ironically, marketing on LinkedIn is thus focused on person-to-person activities, whereas on Facebook, it is more brand-to-person in nature.

Don't Talk to Strangers?

Another difference concerns **stranger marketing**. Whereas on Facebook, most of us are suspicious of friend requests from people we don't know or barely know, on LinkedIn, it is much more common to send a connection request "out of the blue" or to someone you have just met. Ironically, talking to strangers is more difficult on Facebook than it is on LinkedIn! On Facebook, it's impolite to ask what one "does for a living" or to "pitch business ideas," but this is easily and often done on LinkedIn. With even the most tangential of connections on LinkedIn, you can easily reach out and ask for a relationship.

For example, here's a screenshot of me reaching out to *New York Times* journalist Jodi Kantor, with whom I am a second-level connection:



By clicking "connect," I can ask to be her "LinkedIn connection," which then puts us in a "friend" situation (to use a Facebook term). I'd see what she posts to her timeline and (hopefully) vice-versa, plus I can reach out to her directly and see key points of information, such as her email. People on LinkedIn, in short, are in **business networking mode,** and it's OK to connect to 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

Additionally, LinkedIn groups are quite vibrant, particularly in technical subjects. For example, in a technical sector such as oil and gas, people increasingly use LinkedIn groups to stay informed about their industry. LinkedIn's robust groups are thus an example of LinkedIn's focus on "lifelong learning." Another is "**LinkedIn Learning**" (**https://www.linkedin.com/learning/**). LinkedIn Learning showcases how LinkedIn wants to become the place for professional "lifelong learning," and it's off to a great start. Indeed, suppose you or your business have a passionate knowledge asset (for example, you know how to start a small business, you know how to optimize an employee retirement plan, you know how to work with difficult people, etc.). In that case, you can apply to teach a LinkedIn Course at **https://learning.linkedin.com/instructors**. A course on LinkedIn can help you build relationships and market your business effectively. Just brainstorm a beneficial course; don't be spammy and salesy in your LinkedIn course.

Finally, LinkedIn's company pages are yet another opportunity on LinkedIn; however, I would argue that the LinkedIn profile of key employees is more important than focusing on the company page.

LinkedIn is a Team Sport

Perhaps the most important distinction is to think of Facebook as a *company-first* marketing platform and LinkedIn as an *employee-first* marketing platform. On Facebook, you can manage your marketing "top-down," using your company page as your primary customer interaction vehicle, but on LinkedIn, you must rely heavily on your employees. Every customer-facing employee needs to be "on board" with your LinkedIn marketing. They need a robust LinkedIn profile and a passionate commitment to schmooze with other LinkedIn members through outreach, posting, and group participation. To succeed at LinkedIn as a business, each customer-facing employee must actively participate as an individual, and your company should manage its own LinkedIn business page in tandem. LinkedIn, in short, is a team sport for employees.

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

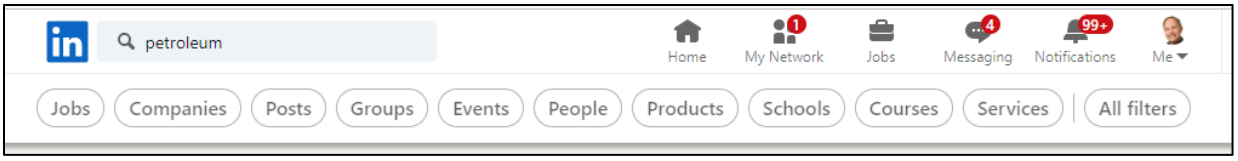
You = You and Your Employees on LinkedIn

Throughout this Chapter, I will often refer to an individual "you" as participating in LinkedIn, but remember that when I say "you," I mean both "you" as an individual and "you" as a team of like-minded, enthusiastic employees. Whether your company consists of just one employee, five employees, or 500 employees, the real key to success on LinkedIn is to get everyone "on board" and participating. Go team!

Search LinkedIn

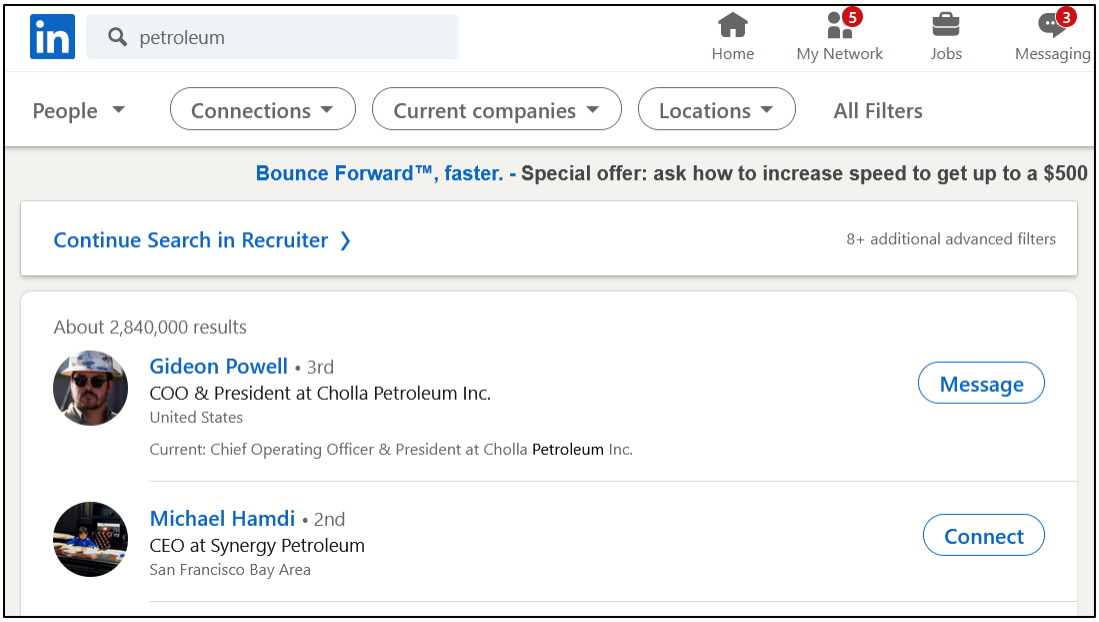
You'll need to research LinkedIn to estimate its value to your business marketing efforts. For your first **TO-DO**, log on to LinkedIn and search by keywords that are relevant to your company or industry. Identify individuals, groups, and companies that are actively engaged in these topics.

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). Then, in the scroll window, select "See all results." Here's a screenshot for the keyword "petroleum" as a search:



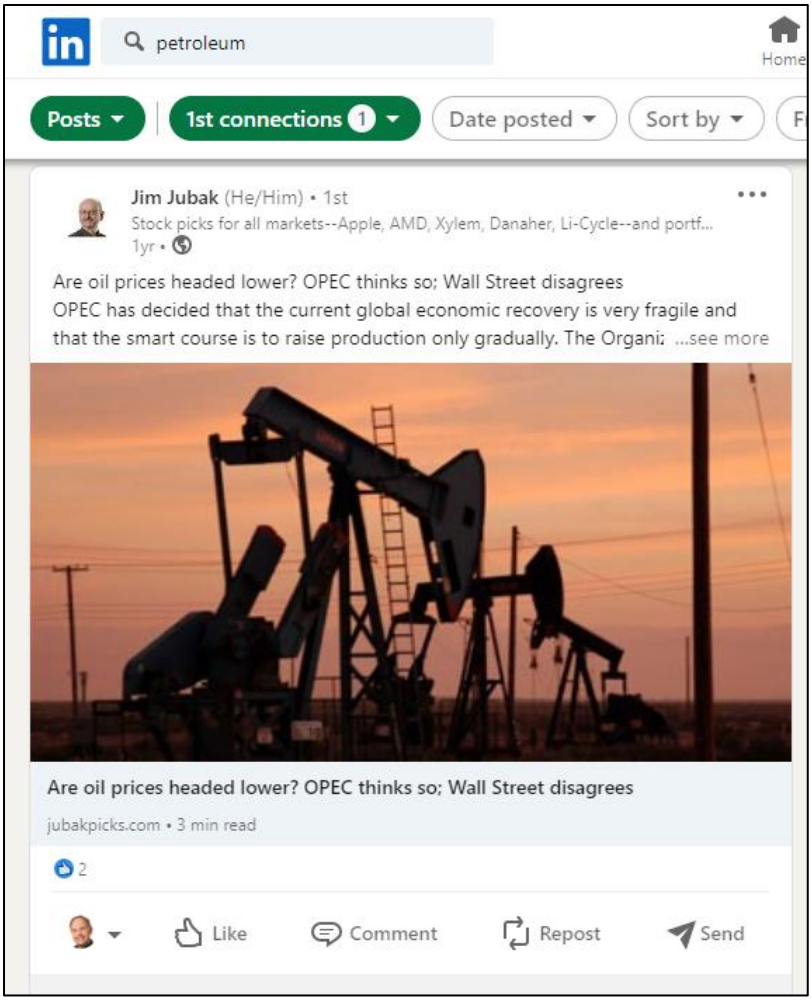
Across the top, you can see clickable buttons for subcategories such as "Jobs, Companies, Posts, Groups, Events, People, etc." These are your drill-down options.

To search for people on LinkedIn who have "petroleum" in their bio, for example, click "people." This will retrieve profiles and/or activities that contain the target word. Here's a screenshot for the keyword "petroleum" and then "people:"



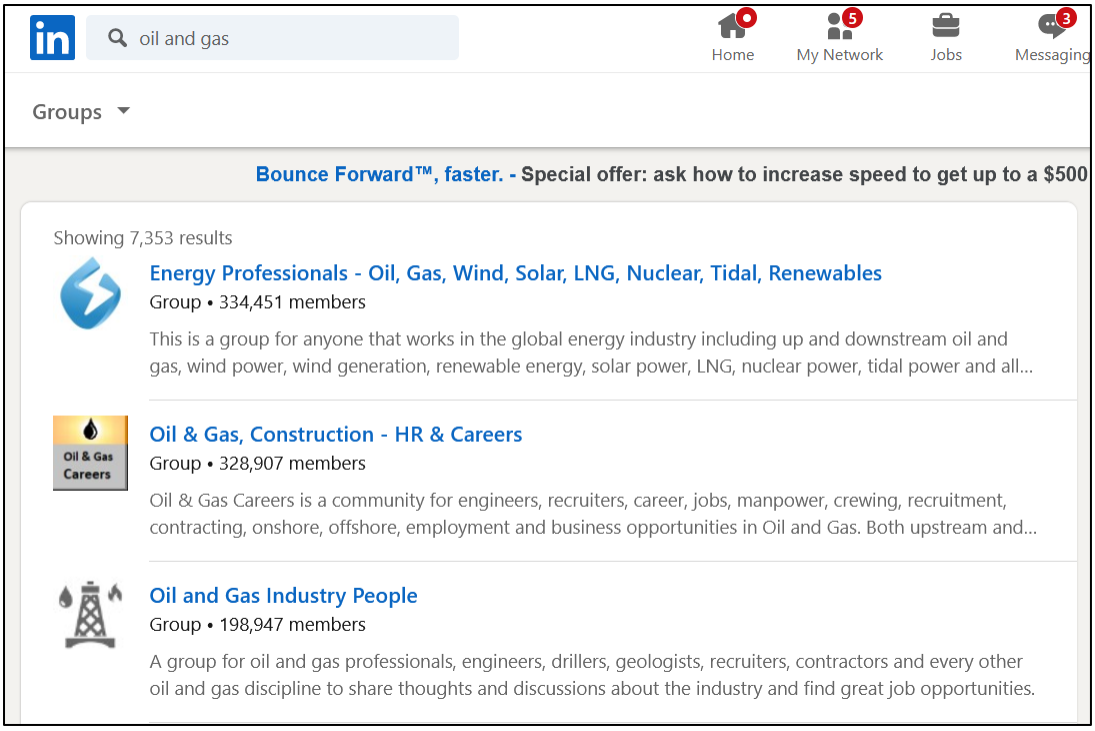
You can then click on any person and see their activity. By selecting "Connections," you can narrow this down to 1st, 2nd, or 3rd-level connections, and you will see more information for 1st-level connections, of course. (1st level connections are people who have already accepted your connection request or vice-versa, whereas 2nd level connections are connections of connections, and 3rd level connections are connections of connections of connections). You can also select "companies" to see companies that have the keyword on their LinkedIn page. You can then "follow" these companies just as you would on Facebook, and you can drill into their employees as well.

Next, you can search for posts that contain the keyword by clicking "Posts." Here's a screenshot for "petroleum" posts by my 1st-level connections:



You can scroll down to browse content on these keywords, and you can click on any person who posted a piece of content. You can also like, comment, and share posts that interest you or serve your marketing goals. In this way, you can quickly scan who's posting what about a keyword such as "oil and gas."

You can also select "Groups" to see what groups exist and, again, see how active people are on a content theme. Here's a screenshot for "oil and gas" groups:



In this way, LinkedIn takes the industry trade show online. Take a content theme that matters to your company and quickly see what's going on vs. people, posts, groups, and pages. But remember that as you do so, the center of gravity is personal profiles, posts, and groups, rather than company Pages. LinkedIn's own marketing propaganda will try to convince you that it's all about your company's page, but in my opinion, LinkedIn is much more employee- or profile-centric. As you research how LinkedIn works, don't miss their robust help center at **https://jmlinks.com/45y**.

For your next **TO-DO**, download the **LinkedIn Research Worksheet**. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), 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 setup and marketing strategy.

» OPTIMIZE YOUR LINKEDIN PROFILE (AND YOUR EMPLOYEES', TOO)

Personal profiles are the foundation of LinkedIn. Just as on Facebook, an individual needs to set up a LinkedIn profile and populate it with information about themselves. Unlike on Facebook, however, this personal profile has a strategic role in business marketing. As a business owner or marketer, therefore, you'll want your own well-optimized profile. Still, you'll also want to motivate your CEO, other key executives,

and any customer-facing employees to optimize their LinkedIn profiles. Make sure that every "customer-facing" employee has an optimized LinkedIn profile!

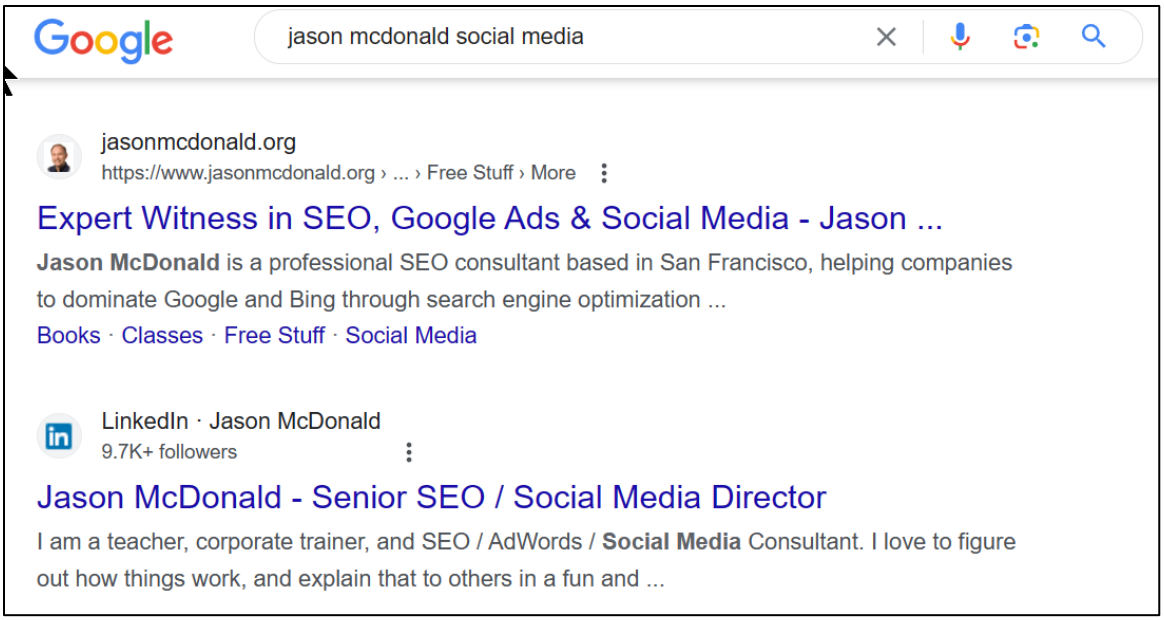
The **TO-DOS** here are:

1. **Sign up** for LinkedIn as a personal profile (and encourage everyone else in the company to sign up as well!) Encourage everyone to make LinkedIn a part of their daily routine for staying up-to-date with our industry.
2. Identify the **content themes** 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** each employee's personal profile so that it –
    a. Clearly and quickly represents both your personal business value proposition and that of your **company**.
    b. It 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 to decide 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 *also flow up to the company*. Nowadays, people attend networking events, such as trade shows, and return with business cards and email addresses. They then *vet* these people and their companies by searching for them on Google and on LinkedIn. Indeed, you can optimize your LinkedIn profile to show high on Google or Bing 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 my LinkedIn profile via Google search, for example, search for "Jason McDonald Social Media" on Google and look for the link to LinkedIn, or visit my "public" LinkedIn URL at **https://www.linkedin.com/in/jasoneg3/**. Note that my LinkedIn profile appears in position two on a Google search for *Jason McDonald Social Media*. Here's a screenshot of how my LinkedIn profile surfaces on Google:



Notice as well that Google shows I have 9,700 "followers" on LinkedIn. This shows the result of both "search" (I show high on relevant Google (or LinkedIn) searches), and "trust," I appear "trustworthy" because I have a lot of followers. The concept here is that I have "engineered" this through hard work and marketing. You can do the same, too.

When someone meets me (*or meets you or meets a key employee*), they'll often go back to their office and "Google" you or look you up on LinkedIn before they reach out for a business relationship. As a marketer, 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 need to be logged into LinkedIn.

> **Think your name plus keywords**. There are approximately 34.9 million 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 Google Ads*. 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*?

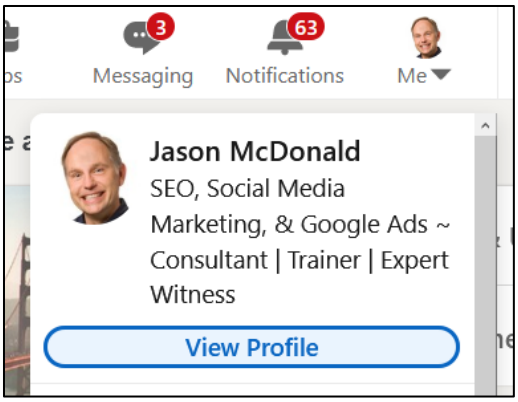
Optimize Everyone's LinkedIn Profiles

Now it's time to call a "group meeting" of your employee team. Instruct each of them to optimize their LinkedIn profiles in relation to your target keywords and customers. All key, customer-facing employees must optimize their LinkedIn profiles.

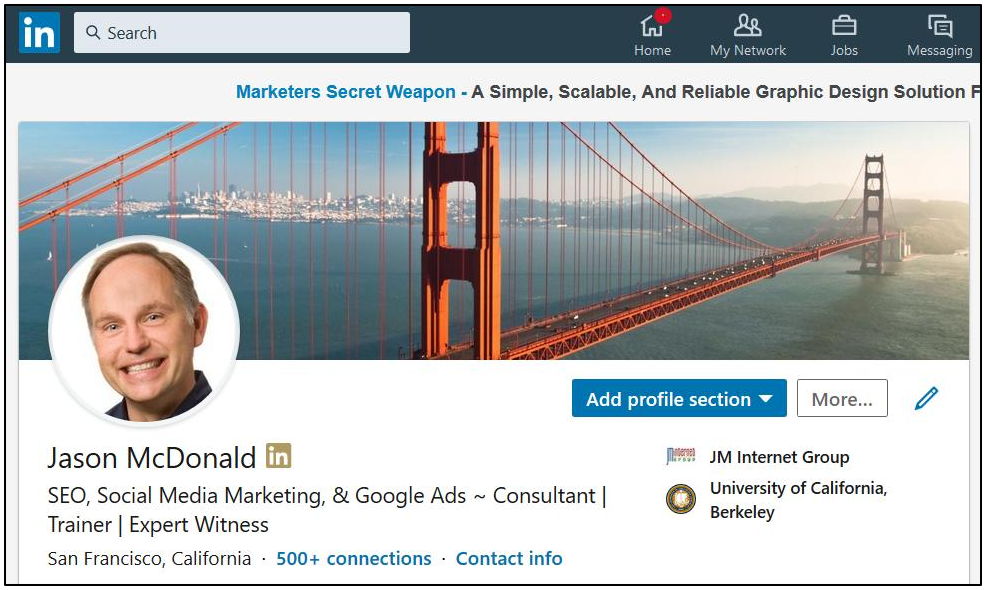
> **Remember***: LinkedIn is a team sport: you need every employee "on board" with complete and eager participation! If they're unenthusiastic about this, explain that this new, optimized profile will be advantageous to them after they get fired for lack of enthusiasm and are out looking for a job. (Just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

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

> **A "Helpful Expert" via Keywords.** What value do you provide for others in a business relationship? Remember: you are NOT looking for a job. Generally, you position yourself as a "helpful expert" in a specific area. Are you a WordPress expert? An expert CPA for small businesses? An architect with a focus on eco-friendly design? Brainstorm and define the logical keywords that someone would append to your name. There are, for example, many "Jason McDonalds" in this world. However, I aim to establish myself as Jason McDonald, a trusted expert who can assist you with **SEO**, **Social Media**, and **Google Ads**. 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 *LinkedIn* > *Me* > *View Profile* while logged in to LinkedIn. Then click on *View Profile*. Here's a screenshot:

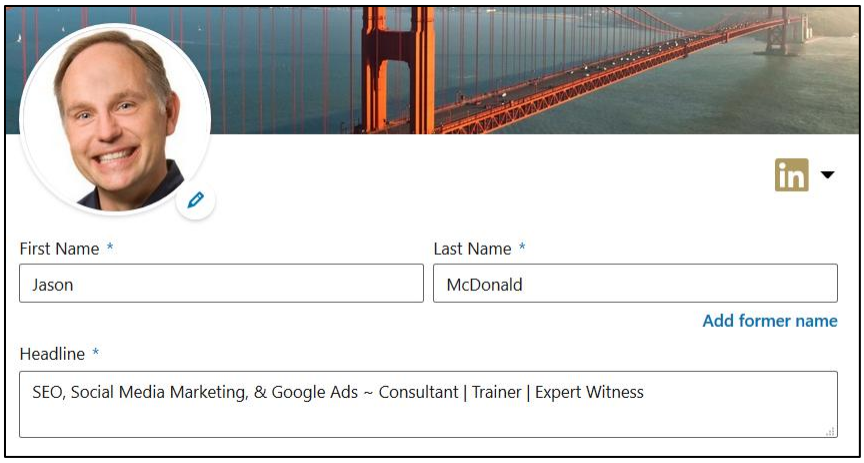


Next, hover over an area, and click on the pencil icon to edit. Here's a screenshot:



At this point, you should be in the "edit profile" section of LinkedIn. Let's go through the optimization step-by-step. (Note: Some of these features may appear in a different order in your Profile than those listed below.)

Headline. This is the most important text on your LinkedIn profile for discoverability via search and as a quick statement of your value as a "helpful expert." It should answer the question, "What can you do for me?" Here's a screenshot of mine:



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

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

Website. You can now add a direct link to your personal website or your "about" page on your company's website.

Audio Recording. You can pronounce your name, plus add in a little pitch about how you are a "helpful expert."

About. 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 to what they might need.

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

(Note: You may have to click out of "edit intro" and back into the more general "edit profile" section to access the next items).

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.

Licenses & Certifications. List any professional certifications here. I am officially certified in Google Ads, for example, so I list that in this section.

Education. Don't be shy. Populate your education section with your educational achievements, including not only degrees but also any awards or extracurricular activities.

Accomplishments. Input any languages you speak, as well as certifications. I speak Klingon fluently, so I put that here. (Humor is part of my brand, get it?)

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

Audio & Video. You can add a "how to pronounce your name" audio clip as well as an introductory video. Use these to quickly state your "value proposition" to customers.

Add New Profile Section. If you'd like, you can further enhance your profile by adding publications, skills, honors, patents, and more. This is located on the top right in blue.

AI PROMPT. Explain to ChatGPT the basics of your LinkedIn profile, including what you are a "helpful expert" in and who your target connections might be. Then copy/paste your profile into LinkedIn, and prompt it, "Given what you know about my LinkedIn value proposition as a 'helpful expert' and my target connections, please give me some recommendations as to how to better optimize my profile, such as suggestions for a better professional headline, description of my past experiences, etc."

The Importance of the "About" Section

If your professional headline is a succinct summary of "what you can do" for your target customers, your "about" section is "the rest of the story." Imagine someone walked up to you at an industry trade show and asked you, "What do you do?". Your first response might be something like, "I'm the marketing manager for ACME Locksmiths in Chicago." If the prospect is interested, she might say something like, "Oh, that's interesting. Tell me more about what you do to market a locksmith." You'd then go through your background, your interests, and how you help market your company. This

"about" interaction is the "rest of the story," hopefully not boring her and, hopefully, motivating her to reach out to you and your company when she needs a corporate marketing officer for a B2C company. Or perhaps she's looking for a marketer herself, and she makes you an offer you can't refuse to improve your career.

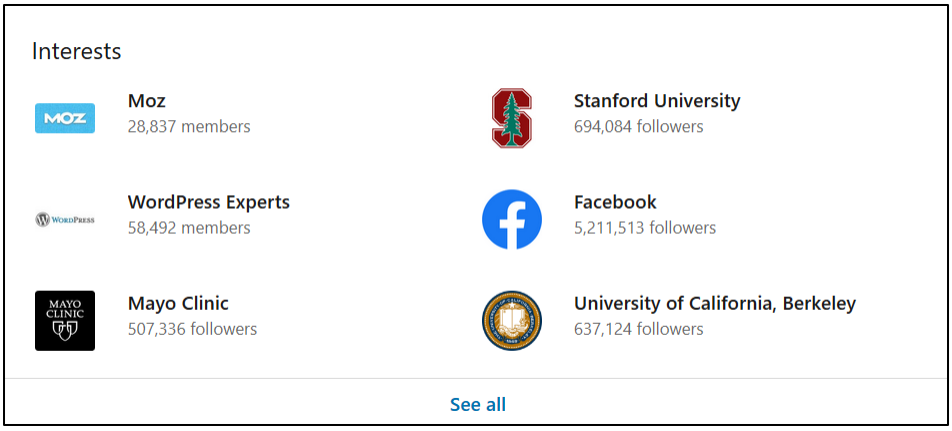
Spend some time, therefore, writing a succinct, snappy "about" section on LinkedIn that explains who you are and what you can do for customers. Review the "about" sections of people like you for ideas. Consider using AI, such as ChatGPT to write your first draft, or if you already have an "about" section, use AI to rewrite it. Give AI a list of your skills, attributes, and target customers, and have it write or rewrite your "about you" section. Read it out loud to friends and family, asking if it clearly conveys what you can do for customers. If not, revise it until it is clear, concise, and engaging.

> **VIDEO.** Watch a video tutorial on optimizing your LinkedIn Profile at **https://jmlinks.com/74e**.

A Word about Interests

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

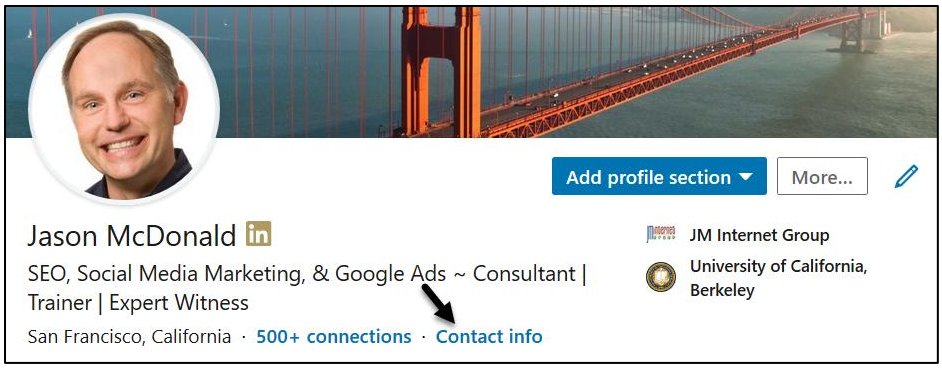
Here's a screenshot of my LinkedIn "Interests," which is people I follow and groups I belong to:



Don't I look impressive? That's the point of my personal profile – to wow potential customers that I'm smart, I'm skilled in technical things like SEO, social media marketing, and Google Ads, that I went to prestigious schools, teach for Stanford Continuing Studies online, and participate in lively groups in my areas of core competency. Is this a bit hyped up? Yes, because that's the point. Explain to every employee in your company that if they don't toot their own horn, no one else will.

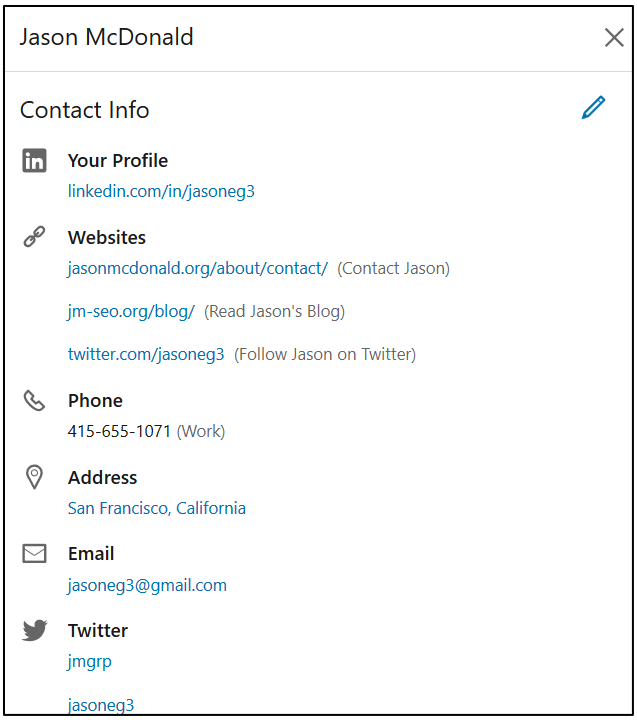
Contact and Personal Info

You want to make it easy for people to contact you via LinkedIn. At this point, stay logged in to "edit profile" and click up to the very top of the page. Find the "Contact info" link and click on it. Here's a screenshot:



Once you click the "Contact info" link, you can then edit how to contact you. This is important as it allows connections to contact you. Click the pencil icon and edit these sections.

Here's a screenshot:



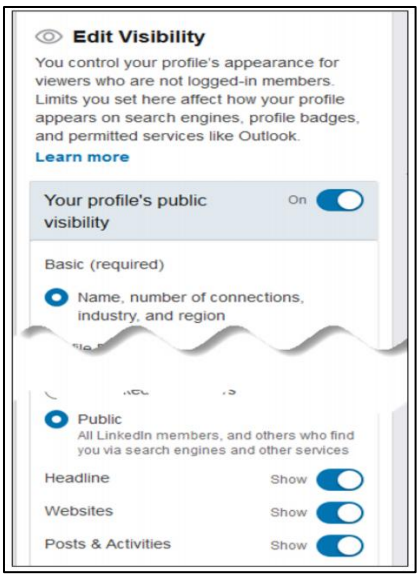
A tip here is that if you select "Other" under websites, you can then write a custom caption. You can see that I've selected "Other" and then written "Contact Jason," which is a direct link to my blog's contact page. This then appears to potential contacts like this:

In this way, I make it easy for anyone to contact me via LinkedIn, even if they are not yet a connection. Note: I would not include my physical address on LinkedIn; there's really no purpose, and the Internet is full of crazies. You can (and should) enter your city if you're interested in local connections. But other than that, I recommend you fill out each section.

Next, optimize your public profile and URL. To do this, click out of "edit contact info" and back up. Then, on the right side, find "Edit public profile and URL." Click on that. Then, click on "Edit URL" to edit your public URL (visible to Google). Choose something short, sweet, and stable. You should not change this after selecting a public URL.

Next, edit your visibility settings. Generally, you want to be 100% public on LinkedIn, but people often misconfigure their visibility settings. Click *Me* > *View Profile,* and then on the far right, click "Edit public profile & URL" and scroll way to the very bottom until you see "Edit Visibility."

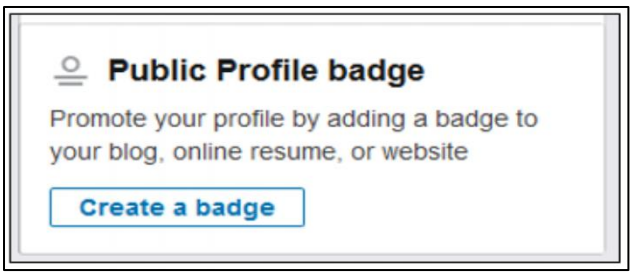
Here's a screenshot:



Mine is set to **Public**, meaning outsiders can see my information. I have also selected "show" for all the features. Generally, most of us want to be highly visible on LinkedIn, so I recommend setting ALL these elements to "show." An exception might be a very prestigious CEO or venture capitalist who only wants to be visible to their LinkedIn connections. However, most customer-facing employees should be visible to everyone. Note, however, that only 1st-degree connections can see your contact information, such

as your email address or phone number, which is why under "contact info," I recommend you include links to your public blog, website, or contact page as well as your X handle, as these are visible to all people on LinkedIn, regardless of their connection level.

Finally, if you scroll to the very bottom and click on "Public Profile Badge," LinkedIn will provide you with the HTML code, allowing you to create a direct link on your personal blog, company website, or other platforms to your LinkedIn profile. This is great for cross-fertilization and to establish yourself as a "helpful expert" on other venues. Here's a screenshot:



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 checkboxes accordingly.*

One of the more common mistakes people make is treating their LinkedIn profile the same way they do their Facebook profile. On Facebook, you often want to be invisible/private to strangers, but on LinkedIn, you often want to be *visible/public* to strangers. Accordingly, setting your LinkedIn to *private* defeats the purpose of search and trust as part of your LinkedIn marketing.

For most people, I therefore recommend setting LinkedIn to be fully *visible/public*.

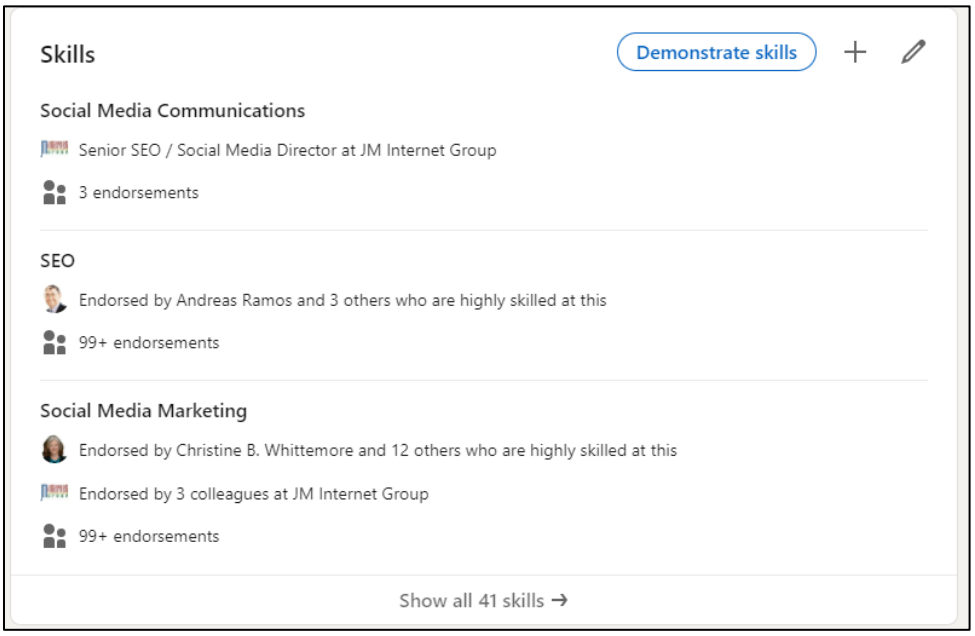
GENERALLY, LINKEDIN IS *PUBLIC* PROFILE & *PUBLIC* COMPANY, WHILE FACEBOOK IS *PRIVATE* PROFILE & *PUBLIC* COMPANY

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

For your next **To-do**, download the **LinkedIn Profile Worksheet**. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), and click on the link to the "LinkedIn Profile Worksheet." You'll answer questions to help you set up and optimize your LinkedIn Profile.

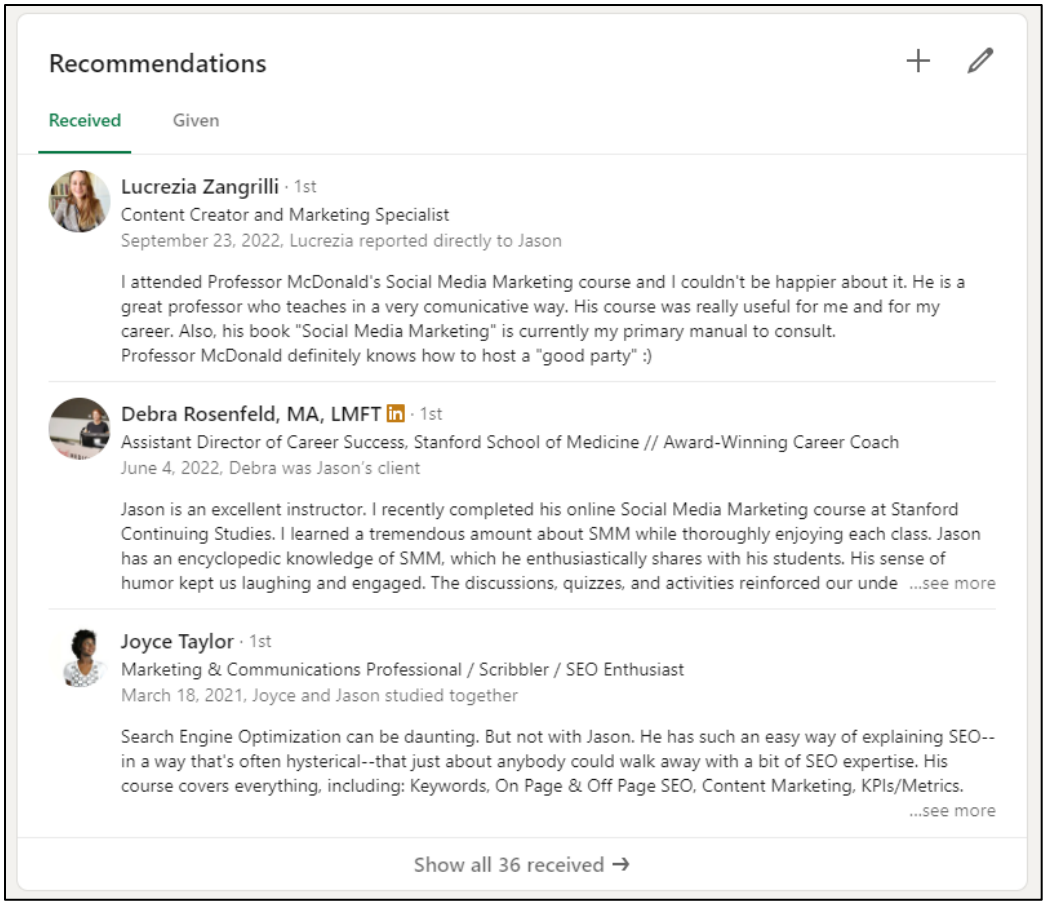
Skills and Recommendations

While building out your profile, you'll notice that some people have many **skills** and **recommendations** on LinkedIn. Like references for a resume, these are generally all positive. Here's a screenshot of my skills:



If you want to be endorsed for a new skill, click the "Plus" sign and add it. LinkedIn will prompt your connections to endorse you for this and all your skills, so over time, you'll build up a bunch of endorsements. To go one step further, check out the "Demonstrate skills" option. In certain technical areas, you can take a test, pass it, and then show a badge on your profile.

Next, look at your **recommendations**. Here's a screenshot:



Note: you control whether recommendations show on your public profile; you can suppress any you do not like. In both cases, your LinkedIn connections endorse or recommend you, thus giving you social clout that you're an expert in a given area.

Solicit Recommendations and Endorsements

Your **TO-DO** here is to ask for recommendations and endorsements from friends, coworkers, and business colleagues. One of the best ways to get them is to do them for other people proactively. After completing a project with an outside vendor, for example, connect with that person on LinkedIn and write a glowing recommendation and endorsement. Often, they will reciprocate. *(This is called a "pre-emptive" recommendation in the LinkedIn lingo.)* You can also click on "Ask for a recommendation" and follow the prompts to ask for a LinkedIn connection for a recommendation. And if you click the "pencil" icon, you can reorganize how your recommendations appear.

Regardless of how you solicit them, obtaining numerous positive recommendations and endorsements will enhance the appearance of your LinkedIn profile.

» SCHMOOZING ON LINKEDIN: YOUR SOCIAL ROLODEX

Nearly everyone needs an optimized personal profile on LinkedIn, if for no other purpose than a job search. For those whose job is "client or customer-facing," meaning identifying, interacting, and engaging with potential clients, the primary purpose of LinkedIn is to facilitate connections. ("Schmoozing," of course, is a wonderful Yiddish 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 first-level contacts and being active on LinkedIn, you can utilize LinkedIn as your online social rolodex, extending beyond just people you actually know to those you'd like to know for your business needs. Let's investigate schmoozing on LinkedIn, namely:

1st-level contacts: these are people who have accepted your connection requests.

2nd-level contacts: These are the 1st-level contacts of your 1st-level contacts (friends of friends, in other words).

3rd-level contacts: These are contacts of contacts, or contacts of contacts.

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. Cher, for example, 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*.

Cher is a 1st-level connection with Jack Nicholson and a 2nd-level connection with Kevin Bacon. (*Which means that my Bacon Number is a four because my Mom knew 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 1st level connections, and you can see through your 1st-level connections to your 2nd level, for example:

Cher can message or email Jack Nicholson directly via LinkedIn. (1st level).

Cher can "see" that Jack Nicholson is connected to Kevin Bacon, and ask Jack to "introduce" her to Kevin, or at least mention that she "knows" Jack Nicholson (2nd level).

Unlike on Facebook, you can easily see your 2nd or 3rd-level connections on LinkedIn. To see your 1st or 2nd level connections, just hit the search bar with a "blank search." Then, select "People" and then either 1st or 2nd to view your connections by level. In this way, I can see that I have 10,000 first-level connections and 1.6 million (!) 2nd level connections (connections of connections). To browse 3rd-level connections, the easiest thing to do is to type a keyword into the search bar, such as "accounting" or "WordPress," click Search, and then select *People > 3rd+*. You can communicate with each level in different ways.

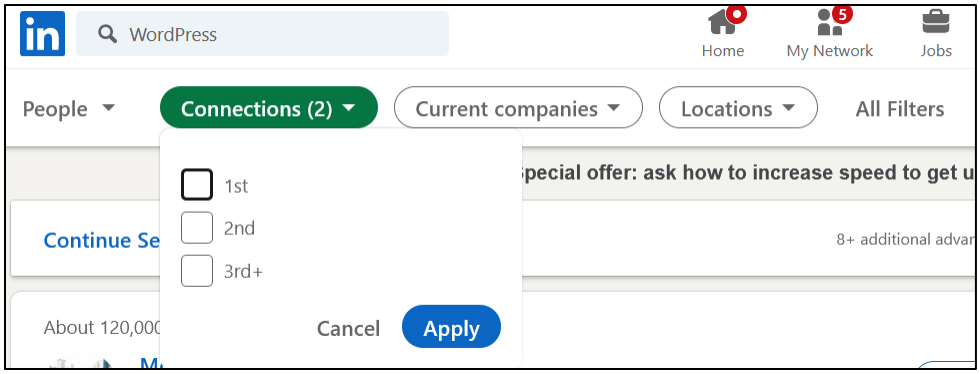
1st Level Connections

1st level connections are the best. You can directly message/find the email of anyone who is your 1st level connection. To do so, search on LinkedIn for the name of someone with whom you are already connected. Then:

> Click on the **blue** "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 a person and then select the "Contact info" tab to 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," "Joomla," or "Accountant for small business," and hit search. Across the top, click on "People." Next, filter by 1st, 2nd, or 3rd-level connection, plus additional keywords. Filter for 2nd level connections, for example.

Here's a screenshot:



Check the box marked "1st," and then you can search your 1st-level LinkedIn connections by keywords, as in this example, for those 1st-level connections I have who indicate "WordPress" in their profiles. LinkedIn also offers more advanced filters, which can be accessed by clicking the "All filters" button located at the top right.

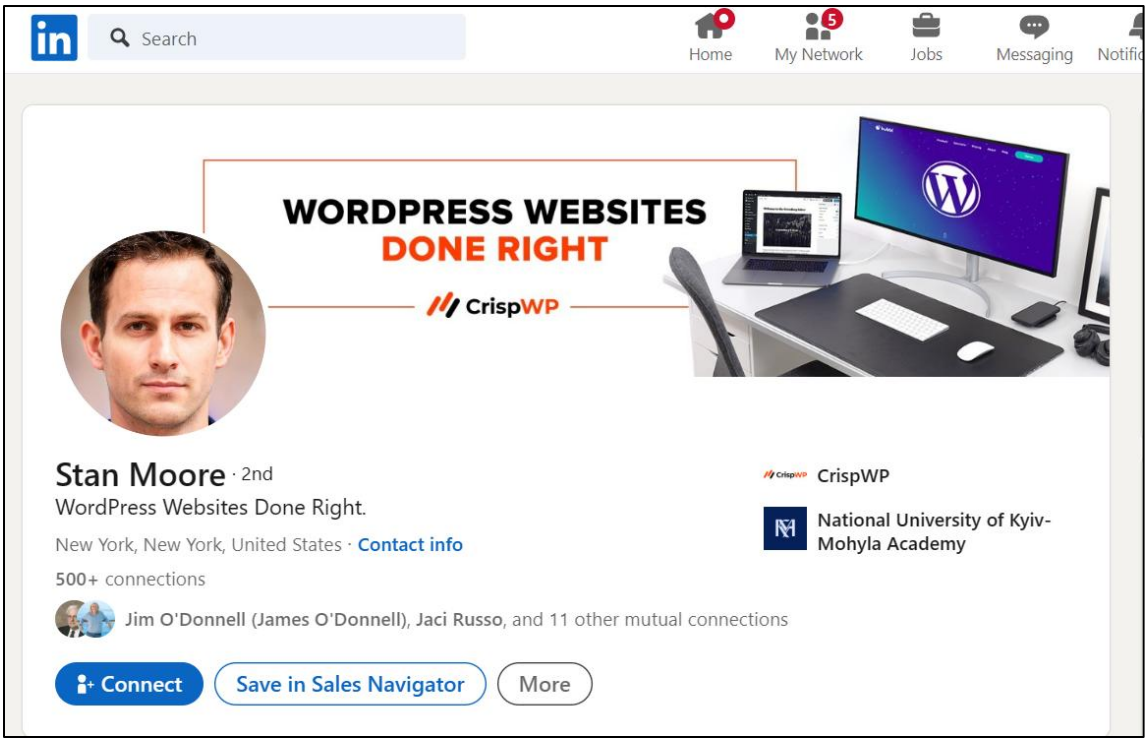
Essentially, you can use LinkedIn as a searchable rolodex of 1st level business contacts: define what type of person you want to contact (or prospect), search for them, and reach out directly. In this way, LinkedIn is like a giant virtual rolodex for organizing and managing your business contacts.

HAVE A REASON OR "CARROT" TO CONNECT

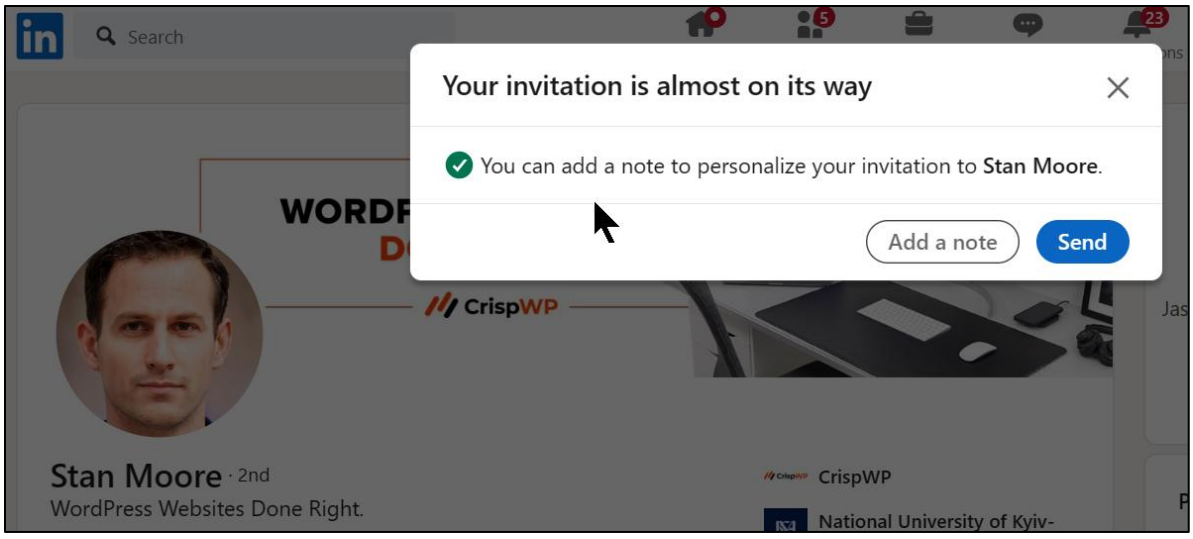
Just as you would in the real world, remember that you need a reason to contact them, some "carrot" or "bait" to start a conversation. Perhaps your business has a new webinar or eBook, or you're attending a real-world trade show and want to invite them to a wine and cheese event. Alternatively, you may be in their city and want to stop by and say hello. You need a reason why you're reaching out, and that reason shouldn't be a shameless, "buy your stuff" type of reason. A "shared interest" will work, but even better is a "reason" to connect. This is another opportunity to use AI. Ask ChatGPT to brainstorm ideas related to "carrot" and "outreach" for your prospects.

Working with 2nd Level Connections

While you can direct message (send emails or see the email addresses of) 1st-level connections, this is not true of 2nd-level connections (who are the 1st-level connections of your 1st-level connections). You can find 2nd-level connections using the same search process (either by name or by keyword). You can then view their profile and click the "connect" button to ask for a connection. For example, here's a screenshot of a 2nd-level connection for me, Stan Moore, who shows up via a search for "WordPress":



I can also see in the small print that my 1st-level connections, who know Stan, are listed. So, for the sake of argument, if I know John Doe, who knows Stan, then I could reach out to John first and ask if he is okay with me mentioning his name. Then, I can message Stan and mention that I know John. To do that, I click on the blue "Connect" button and then the "Add a note" feature to send a custom message:



In this way, Stan is more likely to accept my request to connect. Alternatively, of course, I could mention that I met Stan at a trade conference or have some other reason why we should connect (such as a shared interest in WordPress). He'll also be able to see that we're connected through 1st-level connections, so he's likely to accept. Indeed, most people are on LinkedIn to network, so they're likely to accept connection requests if they seem professional and relevant. Just don't spam out connection requests, or you'll get banned from the platform.

Another technique to use to grow your connections is to:

1. Search LinkedIn by keyword, such as "marketing managers," "WordPress designers," or "small business owners."
2. Identify 2nd-level connections and request connections based on some type of relevancy.
3. Be sure to have a "reason" or "carrot" for the connection, such as a shared interest, or perhaps a content "carrot," such as an upcoming webinar, new book, participation at a trade show, etc.

Note that if you use this process, you'll be able to see first-level connections in their entirety. For 2nd or 3rd-level connections, you need to find the "Connect" button and have a "reason" that they should connect to you. Usually, it's a shared interest, a real-world relationship, or perhaps a "carrot" that makes connecting with you worthwhile, such as a free webinar your company is hosting, a complimentary eBook, or a free consultation on a helpful topic. Don't be too spammy, but you don't need to be too shy, either. Most people are eager to connect with relevant business connections on LinkedIn.

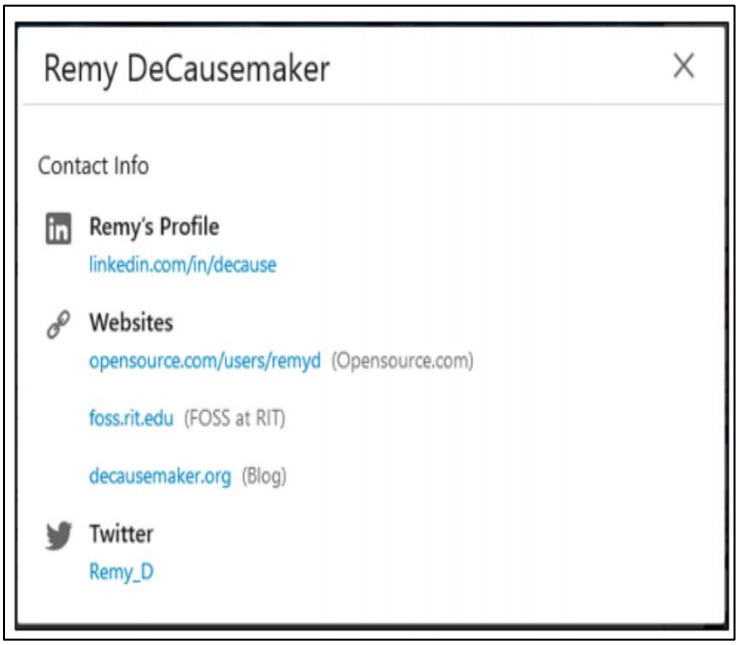
In some cases, you'll be required to know the email address of the person with whom you want to connect; thus, always be on the lookout for potential clients' email addresses. Many people list their email addresses on their business cards, making them a useful tool.

Sometimes, you won't see the "connect" option, so you'll need to try a non-LinkedIn method to reach this person. In this scenario, then, you can:

1. Upgrade your LinkedIn account to a paid account and use InMail to reach out to this person.

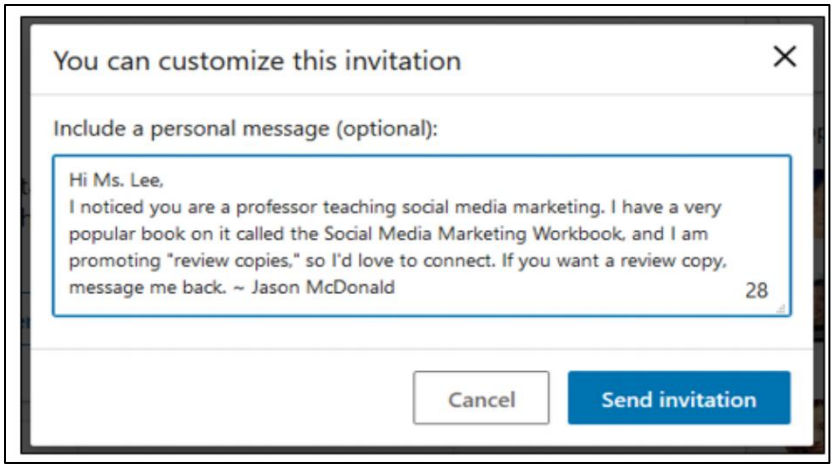
2. Click on their "contact info," and if they have an X account, you can reach out via X.
3. Take their name and some pertinent information, Google them, and reach out via their blog or website.

For example, here's a screenshot of a 3rd-level person who has inputted his contact info:



In this way, I can start the relationship "off" of LinkedIn, and then once we know each other in some fashion, send a connection request, which is more likely to be accepted. Most people are open, however, and in my experience, generally accept connection requests even if they are "out of the blue."

You can mix and match job titles and keywords. I often search for "professor" (a job title) and then "social media marketing" (a keyword phrase) to identify professors who may be teaching marketing courses and are interested in assigning my book. Then, I look for first, second, and third-level connections. If we're not connected, then I send a custom message such as this:



In your case, you have these steps:

1. Identify potential LinkedIn connections by searching by keyword and/or job title.
2. Click the "connect" button (if available).
3. Have a reason or "carrot" as to why they should connect to you for your personalized note.

Carrot and Outreach Marketing

As you build your connections, identify the reasons why they would like to connect with you. "What's in it for them?" is always the question to ask when reaching out on social media. I teach my students that this is "carrot and outreach marketing," essentially:

1. Brainstorm a "**carrot**" that will be enticing to your prospects. This might be a "free webinar" or a "real-world wine and cheese event." It might be an eBook. It might be a substantive free consultation on a timely topic.
2. Have this carrot ready, meaning have it prepared to include in a response email or a feedback form on your website.
3. Research relevant prospects on LinkedIn via keywords.
4. Connect with them and include your "carrot" in your message.

5. When they respond with interest, send them your carrot and begin a fruitful relationship with them.

VIDEO. Watch a video tutorial on "carrot and outreach" content marketing at **https://jmlinks.com/74f**.

Here's a typical LinkedIn scenario for first- and second-level connections.

Let's suppose you are the sales 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 2025 widget" 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 new "Proteomics 2025 widget." It's a business meeting with a little fun, a little free food and drink, and some salesy information about your new widget.

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

Proteomics

Check: People

Check: 1st level

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

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

Next, conduct your search using a keyword filter for 2nd-level connections. Find a connection that interests you, and click on their name. When LinkedIn asks you for a custom note, explain that you'll be at Proteomics World in Boston and that you'd like to invite them to your wine and cheese event. They will likely accept it because it's relevant and sounds fun. You can also do this for 3rd-level connections.

Once your 2nd or 3rd-level connections accept your connection request, they become 1st-level connections, and you can directly message them via LinkedIn. Thus, the "circle of schmoozing" continues…

Alternatively, you can send what LinkedIn calls "Message ads" (see: **https://jmlinks.com/73y**), but it's probably more effective to reach out for

connections directly. 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 utilize your 1st-level connections to reach your 2nd-level connections. The to-do for LinkedIn is to continually expand your 1st-level network, but how?

Seek to Grow 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 businessperson 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 1st level connection.

No Spamming. Be respectful of LinkedIn's professional culture. Don't spam out contact requests willy-nilly. In fact, if you are overly aggressive, LinkedIn can ban your account for life due to spammy outreach.

Have a Reason or Carrot. Have a reason why you're seeking a connection, especially something beneficial to the target. Don't have the attitude of "Please connect with me because I want to sell you something." Rather, have the attitude of "Please connect with me because it's in YOUR interest, Mr. Prospect, and here's why."

Lifetime Limit. Be aware of the lifetime limit of 30,000 total connections and a weekly throttle of about 100 requests per week, designed to prevent connection spamming.

Reach out to People Who Viewed Your Profile. Over time, people will "check you out" on LinkedIn. LinkedIn monitors who viewed your profile. Even at the free account level, and even more with a premium account, you can see who looked at your profile and then reach out to them with a connection request, explaining, "Hey, I see you looked at my profile. Let's connect!" To see who

viewed your profile, look to the far left under your picture and click on "Profile viewers." If you don't see it there, just visit **https://jmlinks.com/46d**.

Identify People and Ask for Connections. It's not difficult to reach out to total strangers on LinkedIn. If you limit your outreach requests to ten or fifteen a day, and they are relevant, you shouldn't have any problems. First, identify a keyword search that identifies your customers (e.g., "small business"). Then, reach out to second- or third-level connections. Add in an introductory note, for example, "I see we are both interested in small business, and I thought we should connect. I share tips on how to use QuickBooks for business…"

> #1 - Set aside an hour a week, identify people with shared interests (i.e., "potential customers"), and send connection requests. Then, follow up with helpful, informative NON-SPAMMY content.
>
> #2 - Services such as *LinkedIn Helper* (**https://www.linkedhelper.com/**) can automate this process, but be careful as any automated or spammy outreach strategy is against LinkedIn's Terms of Service. Use at your own risk!

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, click on *Me > View Profile > Edit public profile & URL* and scroll to the very bottom).
- **Other Social Media**. Connect your LinkedIn to your X, Facebook, blog, etc., and encourage people who already follow you on X, for example, to connect with you on LinkedIn. If you have an email list, ask people to connect with you by sending them an email.

Use Content Marketing. Like all social media platforms, LinkedIn is "all in" when it comes to Artificial Intelligence and content. Thus, by creating informative and engaging posts and articles, LinkedIn will promote your content to people who are not familiar with you. Then, with a bit of nudging, such as "follow me for more information on topic 'x,'" you can use content marketing to grow your LinkedIn network.

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

With Whom Should You Connect?

There are various strategies for reaching out to or accepting connection requests from others on LinkedIn. There is no correct answer. Someone who is customer-facing (e.g., a sales representative) should probably accept *every* inbound request. For a venture capitalist, they might accept requests only from people they really know. Another strategy is only to 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 messages, 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 disconnect if they spam you.
- Connect only with people you actually have met in real life or in some capacity, 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).
- Connect only with people who would help you move or connect only with people who will help you move bodies. I'm just kidding, of course, but you can be very selective if you "have the money" or "have the influence" and are more the recipient of requests than the sender. A famous venture capitalist with a bag of money, for example, can be very choosy. A newly hired sales guy at a tech firm, not so much.

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 salesperson 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 and the prestige of a "premium" account.
- Ability to turn on "LinkedIn Open Profile," which allows ANYONE to message you via LinkedIn regardless of whether they are 1st, 2nd, or 3rd level connections. To learn more, visit **https://jmlinks.com/53f**.
- Better positioning when applying for a job.
- Access to everyone who's viewed your profile in the last 90 days.
- Ability to see 3rd-degree profiles.
- Additional search filters and the ability to filter and save search results (great for sales prospectors).
- Learning Resources via LinkedIn Learning.
- 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/**.

Your **TO-DO** 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 secretive, perhaps using LinkedIn solely as a public resume and keeping up-to-date on industry trends makes sense, in which case connecting only with real-world connections is a viable option. Remember: once you accept a connection request, you become a first-level connection, meaning that person can directly contact you via LinkedIn and email, as well as view your contact information. Similarly, they can see your second-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; pre-think a plan that makes sense for your marketing objectives.

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 next **TO-DO**, download the **LinkedIn Schmoozing Worksheet**. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), 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 every customer-facing employee.)

» BE ACTIVE ON LINKEDIN: POSTS, ARTICLES, AND VIDEO

In the real world of business, it's a truism of marketing that you need to "look active." People respect those who are involved and engaged, and look down on those who seem to be doing nothing. Similarly, on LinkedIn, it is essential 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 – posts, articles, and videos – as well as 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. Just as at a business networking event, be actively engaged. 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 of why getting all your customer-facing employees "on board" is a key element of LinkedIn success.

LinkedIn Content

You want to distinguish the possible pieces of content you can post to your profile on LinkedIn (we'll cover company Pages in a moment). The most basic are:

> **Text**. As on Facebook, you can literally just log in to LinkedIn and share an idea or thought, such as, "It's Monday! And I am super psyched because Monday means the start of my work week!"

Photos. You can upload a photo with or without some text. Imagine taking a picture of your lead salesperson at your booth at the Consumer Electronics Show.

Videos. LinkedIn has gone "all in" on video and is favoring "native" video uploaded to the platform. You can also post a link and summary to a YouTube or Vimeo video.

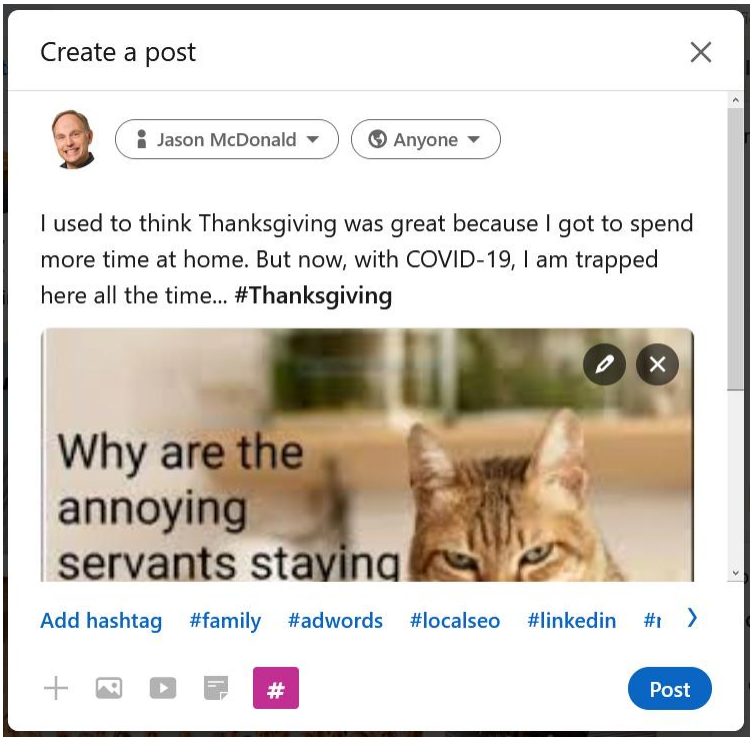
Articles. LinkedIn has its own "native" or "internal" blogging platform. Thus, you can write a long-form article and leverage LinkedIn's algorithm to push it out to fellow travelers on the platform.

As on Facebook and other networks, you can (and should) include #*hashtags* in your post. LinkedIn has worked hard to increase the use of hashtags on the network, as it aims to be not just a place to search for jobs but also a hub for industry updates and continuing education.

Let's review the content opportunities on LinkedIn one by one.

Texts and Photos

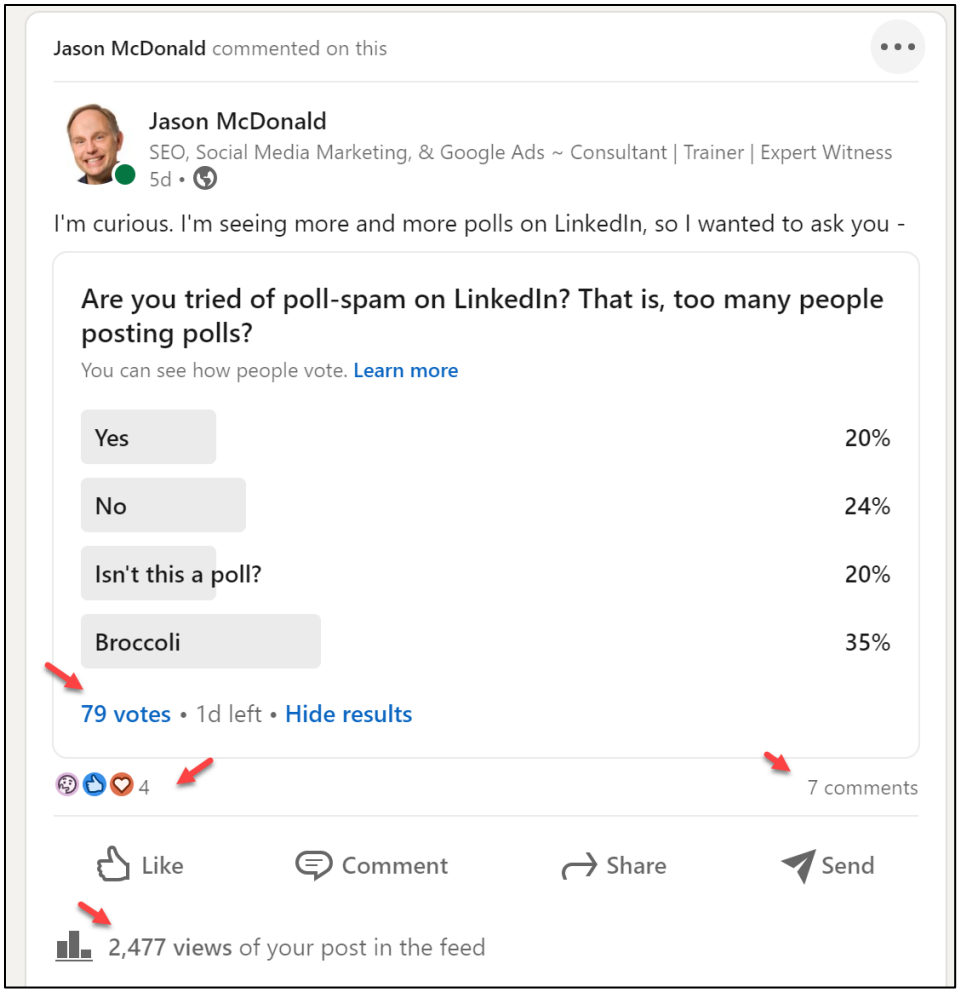
This is the easiest to understand. When you log in to LinkedIn, you'll see a box labeled "Start a post," and underneath, icons for media (photo or video) or a document (which allows you to upload a PDF, for instance). Just start typing and share a thought. To include an image, click the image box/camera icon and upload a photo from your phone or desktop. Here's a screenshot:



At the top, click on the downward icon under "Anyone," and LinkedIn provides options such as sharing with the public, only people connected to you, and to public X (if you have attached X to your account). You can also share with a group of which you are a member. Hashtags in your posts are clickable and discoverable across LinkedIn.

You can also include a **link** to an external resource (such as your blog, your book on Amazon, or a landing page on your website). LinkedIn will automatically shorten the URL for you, which is a nice feature. Once you make a post, you can then click on *'Me'> 'Post and Activities'* to view data on the number of likes, comments, and shares your posts are receiving. Here's a screenshot of a post by me with some data:

As you post text, links, videos, photos, memes, infographics, and the like, you can measure their success by scrolling through your timeline. Go to *Me* > *Profile* > *Activity* > *See All Activity* to see this data. This will show you all your recent posts. Then, you can drill down into an individual post to view its engagement. Here's a screenshot of a tongue-in-cheek post I did on using polls on LinkedIn:



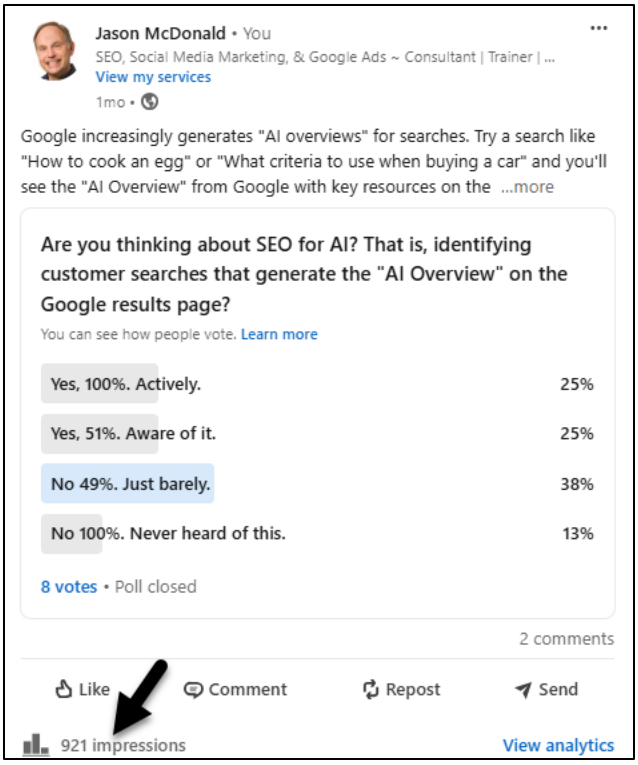
In terms of engagement, this post received 2,477 views, 79 votes, 4 likes, and 7 comments. It's pretty good for an easy poll; notice how "Broccoli" came out as the winner at 35%.

Thus, you can measure your posts (and those of your employee team members) to see what type of content is favored by the LinkedIn algorithm and which posts are getting the most engagement. Remember: just as on Facebook, if you share a *post* to your profile and I am a first-level connection, then that post has a good chance of showing up in my *news feed*. The news feed on LinkedIn is the first content that greets a person when they log in. You're looking for likes, comments, and shares as metrics that indicate engagement.

Content is king, queen, and jack on LinkedIn, as it is 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 to share on LinkedIn as *posts* or as *articles* to LinkedIn (more on articles 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 external blog and are posting items that fit with LinkedIn's professional focus, post headlines, short summaries, and links to your blog.
- **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 on, and share items that are relevant to your industry, particularly those that align with 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, and seven things you didn't know lists, especially ones that are fun yet useful, are excellent for LinkedIn. **Memes** are also great content.
- **Quizzes, Polls, 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.

Polls, in particular, tend to generate high engagement on LinkedIn. Brainstorm some common industry pain points and ask three to four questions about each one. Use ChatGPT to both brainstorm and create your poll theme and questions. Polls consistently generate the highest engagement metrics. Here's a screenshot of a recent poll I created on Google AI Overviews:



Clicking through to "view analytics" gives even more data on who participated in and viewed the poll.

> **AI PROMPT.** Explain to ChatGPT your basic value proposition and target connections. Then, ask it to help you brainstorm content for example, "Knowing what you know about me and my targets, brainstorm five ideas for a prompt on subjects of high interest. Make them snappy, informative and likely to get engagement. Also give me five ideas for polls that are timely for our industry."

Articles

One opportunity not to be missed on LinkedIn, in terms of posting, is sharing articles. LinkedIn is aggressively trying to grow its role not only for job seekers but for the fully employed. *Articles* post to LinkedIn's internal blog, and anyone (including you) can easily post an *article*. 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 *internal* blogging platform.

To get started, search for articles posted to LinkedIn that are relevant to your social media keywords and themes. LinkedIn, unfortunately, doesn't have an effective way to search for articles. So go to Google and type in:

site:linkedin.com/pulse {keyword}

for example:

site:linkedin.com/pulse petroleum

You can also use the "Tools" menu on Google at the far right and filter for articles posted in the last year or month. To check out a sample search, visit **https://jmlinks.com/45z**.

In this way, you can find native articles on LinkedIn posted by people in your industry. For example, here's a screenshot of an article entitled "From Play Concept to Discovery: New Emerging Oil Plays in the Frontier Basin of Pakistan."

From Play Concept to Discovery: New Emerging Oil Plays in the Frontier Basins of Pakistan

Published on December 25, 2019

Nadeem Ahmad, Ph.D.
Sr. Advisor Exploration & New Business since Feb-2017, UEP (& Sequence Strat Specialist, 2000-2001, BP)
15 articles
+ Follow

East Bolan-1 and Margand X-1 are the two recent hydrocarbon discoveries in the Jurassic Chiltan-Sembar and U. Cretaceous-Paleocene Parh-Ranikot reservoir-seal pairs [1, 2] in the frontier sub-basin of the northern Kirthar Fold Belt [3]. These confirm at least three controls previously underestimated during the exploration of oil and gas in the region:

1) The role of "prime top seal" for an effective and prolific petroleum system in addition to the conventionally perceived local top seal (cap rock) and thick, rich and mature source rock,

2) The approach of defining genetically associated "reservoir-seal pairs" (the Plays) within a sequence stratigraphic framework

Like Comment Share 164 · 11 Comments

You can see it got 164 likes and 11 comments. In this way, you can quickly research what articles others are posting natively to LinkedIn and the extent of engagement they are incurring.

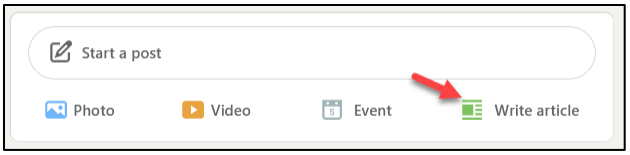
You can also click on the author's name and even "follow" him, which is not the same as connecting. You can now "follow" people on LinkedIn in a public way, which is akin to following them on X or on Medium (**https://medium.com/**), which are 100% public platforms. The difference between following and connecting is that in the former, you see their posts in your newsfeed, but they do not see yours; in the latter, both of you see each other's posts.

In this way, you can research what's being published on LinkedIn that's getting engagement in your industry, follow "competitive" people on LinkedIn, and stay competitive yourself.

As you brainstorm topics to write your own *articles* for LinkedIn, 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. Pay attention to trending topics that appear at the far right when you log in to LinkedIn or search by keyword in your industry. The "trend is your friend," so to speak.
2. **Brainstorm and identify keywords** using tools like ChatGPT, Google autocomplete, Ubersuggest, or Answer the Public. (See **https://jmlinks.com/smmdash** for these tools under the "keywords" section). Pay attention to what's trending on LinkedIn, which authors are getting engagement in your industry, and why.
3. **Write a strong article with a great headline**, a catchy first paragraph, and some substantial content that will be useful to readers and position you as a "helpful expert."
4. **Tag your article with relevant tags and use hashtags** – these influence whether your article will show in their news feed and/or relevant searches.

Inside LinkedIn, articles live under the icon "Write an article." Here's a screenshot:



To write an article, click on "Write an article" and start writing. LinkedIn is very keen to promote articles. The platform is trying to grow beyond job search to be more of a site for "lifetime professional learning." Piggyback on this trend, and LinkedIn will promote your articles not only to your own connections but even to people you do not know. For this reason, articles on LinkedIn are a great promotion strategy!

For example, you can see a LinkedIn article by me on "United Breaks Noses: What United's Latest Really, Bad Day Teaches about Social Media Marketing" at **https://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. To do so, go to *LinkedIn* > *Me* > *Posts and Activity*. Then click "More" and then "Articles." On any given Article, click "View Stats." LinkedIn will provide you with data on impressions, engagement, views, and demographics. In this way, you can identify which articles generated engagement and which did not, allowing you to optimize your content marketing to provide your target customers with more of what they like.

Articles Reach Beyond Your Connections

LinkedIn articles also allow individuals with whom you are NOT 1st-level connections on LinkedIn to "follow you." Even better, when you share your LinkedIn article on other social networks (e.g., X, Facebook, Pinterest) and encourage people to follow you on LinkedIn, LinkedIn monitors this activity. If you get enough momentum, an article can "go viral" and really supercharge your LinkedIn connections. In summary, mix posts to LinkedIn from your own blog, content from others, and native articles on your LinkedIn timeline.

Video

LinkedIn has gone all-in on video, now allowing native video on both profiles and pages. In fact, rumor has it that their algorithm favors "native" video over posts that link to competitors' YouTube, Vimeo, or Facebook.

It's not hard to post a video, either on the phone or by uploading it to your computer. The hard part is creating the video. Just as with any content, brainstorm:

- **Your target audience**. What do they want to watch and why?
- **The content itself**. For a video, storyboard, or at least outline what you're going to talk about in your video.
- **The technical aspects**. Fortunately, LinkedIn videos do not need to be technologically spectacular. It's more important that it be authentic and valuable to your audience than slick and Hollywood-esque.

Many videos on LinkedIn are commentary on industry events; a common type is a person at an industry show sharing their perspective on the "goings-on" at the show. To upload a video, click on "video" on either the mobile app or desktop and upload. Note that the upload can be very slow, so do not close the browser window until it is fully uploaded. To view the help file about LinkedIn video, visit **https://jmlinks.com/46b**.

Tip: Once you post a video to LinkedIn, find it in your feed, click the three dots in the top right corner, and select the "share link."

Copy that link and save it somewhere because, once your feed ages, it can be tough to find your video posts. You can also embed the post on your website or blog, just as you would with a YouTube video. To see an example, check out this video from leading LinkedIn guru Viveka von Rosen at **https://jmlinks.com/46c**. As far as I know, there is no way to search for "native videos" on LinkedIn, but you can try to search content for "video" plus your keywords, as in "video organic," and then browse to see which video is native.

How frequently should you post?

Now that the LinkedIn news feed is very crowded (and the reality is that only a 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. However, this differs with each audience, so pay attention to your shares by monitoring thumbs-

ups and comments (*for LinkedIn posts*) and stats (*for articles*). Your goal is to be interesting, informative, helpful, and friendly, as these trust indicators will hopefully lead to social sharing among your LinkedIn connections, primarily through articles. Note that you can see who has responded to your posts, allowing you to connect with them. Finally, an *article* should be a more thoughtful, in-depth piece of content, rather than a post on LinkedIn, which can be brief and concise, such as sharing your thoughts on a trending topic in your industry or providing a brief headline and link to an interesting article written by someone else.

Create a LinkedIn Content Marketing Plan

For your next **TO-DO**, download the **LinkedIn Posting Worksheet**. Sit down with your team and work together to develop a comprehensive plan for the company, as well as individual plans for each key employee. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), and click on the link to the "LinkedIn Posting Worksheet." You'll create a systematic plan for posting on LinkedIn, including both your own content and that of others.

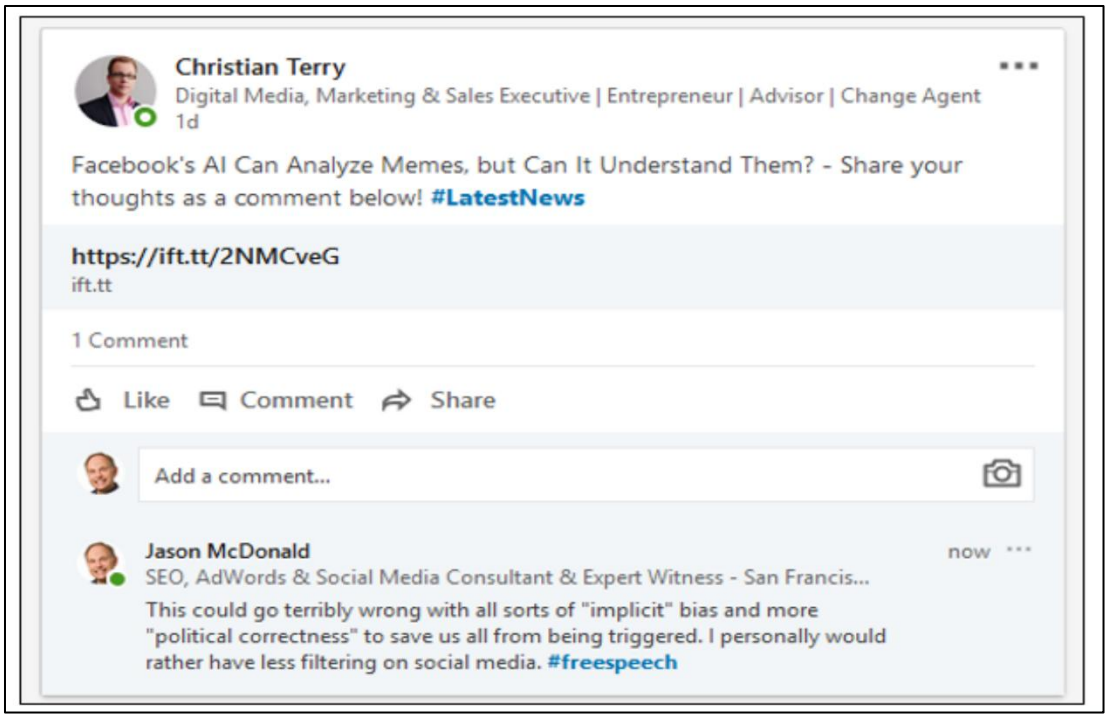
Although it is fun and easy to post, the reality of LinkedIn today is that, outside of job seekers, not everyone checks LinkedIn on a daily or even weekly basis. So, while frequently posting to LinkedIn is a good idea, recognize that LinkedIn does not have the same sheer volume of active engagement as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

» BE ACTIVE ON LINKEDIN: CONNECTIONS, COMMENTS, AND GROUPS

Interactivity is where it's "at" on LinkedIn, so get your team to interact with their connections and followers on LinkedIn. Let's review some of the interactive opportunities on LinkedIn to stay top of mind with customers and prospects.

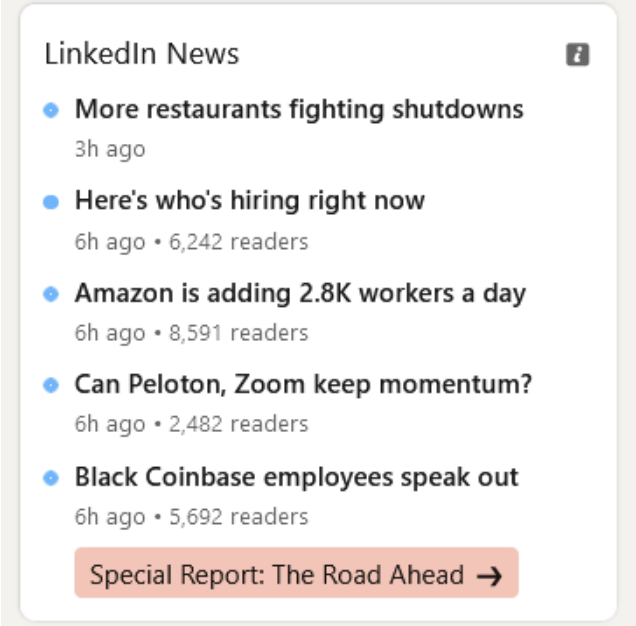
Connections and Comments

When you log in to LinkedIn, you'll see your news feed. LinkedIn prioritizes content by your connections, so you'll generally see content posted by connections first. This is a good opportunity to scan new content quickly and then like, comment, and share. Note that when you do, LinkedIn will notify the person who created this content. For example, here's a post by Christian Terry about Facebook memes, and he's asking for comments. When I comment on his post, he'll get a notification, as will people to whom I am connected. My interactivity pays off by helping me to stay top of mind with everyone I'm connected to on LinkedIn:



Note as well that when you comment on something, it shows in your "posts and activity," which you can get to by *LinkedIn > Me > Posts & activity*. Another good idea is to log in to LinkedIn and look at the far right of the screen under "LinkedIn News." Here's a screenshot:

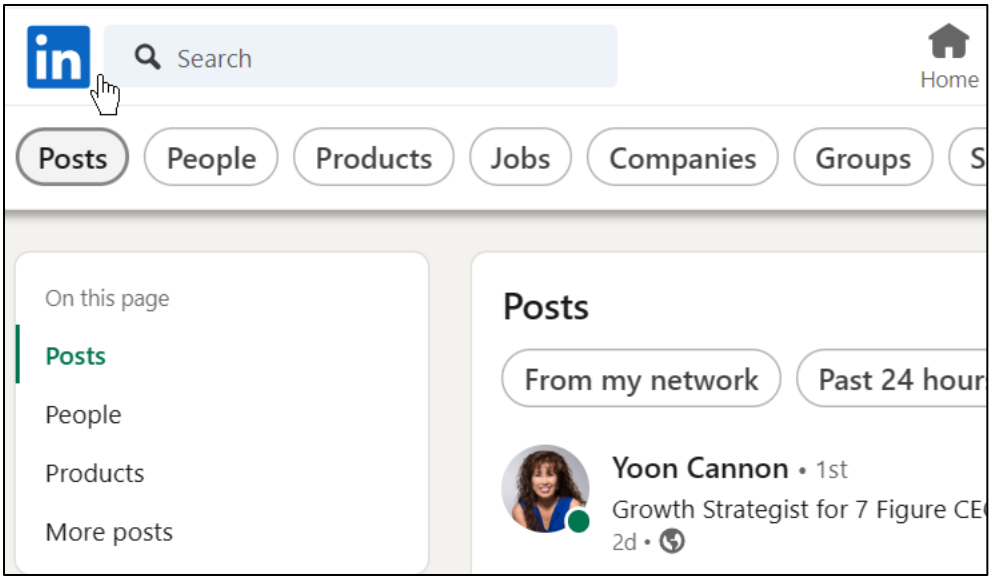
:



This means, for example, that 2,482 persons are engaging with the article entitled "Can Peloton, Zoom keep momentum?" You can then click on this trending article, see posts on it, and chime in with your own two cents. Using **interactive content** is a great way to schmooze yourself into the hearts and minds of other folks on LinkedIn. Here are your steps:

1. Research content on LinkedIn by looking at hashtags, trending topics or doing keyword-focused searches for "content" in the top bar.
2. Peruse content on that theme that is of interest to you and your target customers.
3. Like, comment, or share others' content. Note that when you comment on their content, they get a notification (!).
4. As people react to your comments, reach out to them with connection requests.

Interactive content – when you like, comment, and share the content of others - is an excellent way to enhance your LinkedIn visibility. Instead of just viewing your news feed, go to search, click on the blank search bar, and select "content" at the bottom without typing anything in. Here's a screenshot:



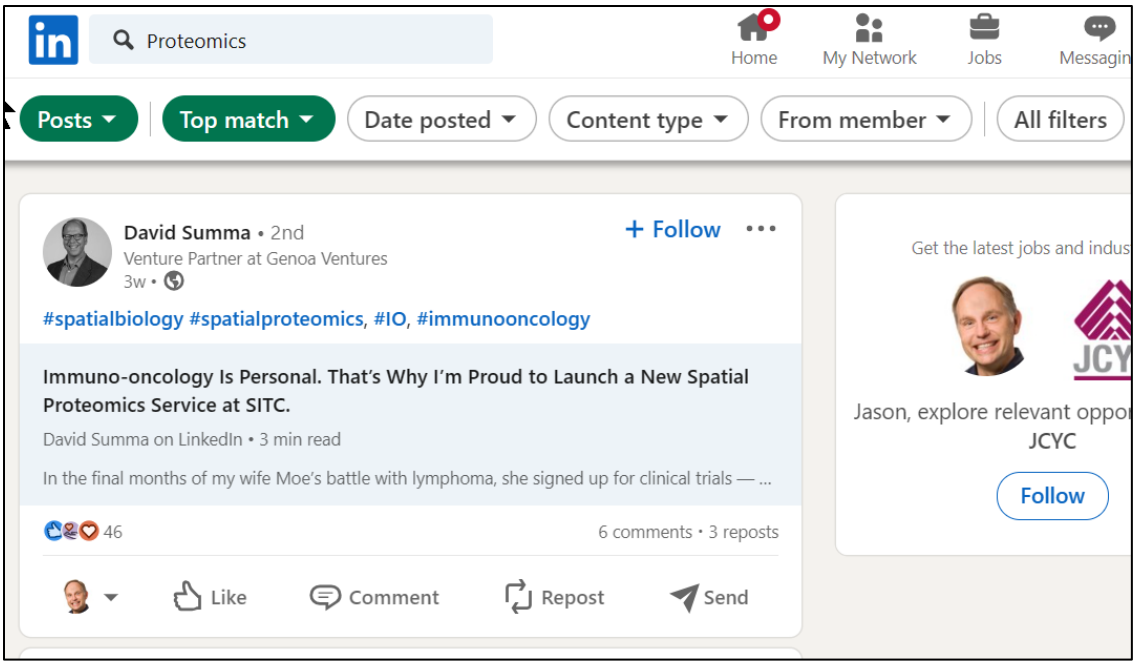
Then click on "All filters" and then posted by "First Connections." You can bookmark this URL or share to your start.me page. Then, you can quickly see posts made by your

first-level connections on LinkedIn, liking, commenting on, and sharing them as a content marketing strategy to stay top of mind.

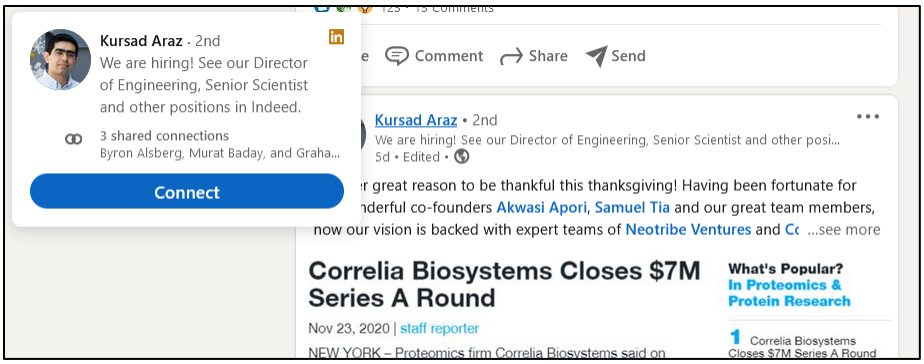
> **AI PROMPT.** Create a template for ChatGPT to respond to posts in your industry with a quick compliment, a reaction, and an additional factoid about the topic. Then copy/paste posts from your connections, ask ChatGPT to draft a response, and then refine its response to make it more human-like. Use ChatGPT to semi-automate your "interactive" content strategy on LinkedIn.

Search by Keyword for Content (and Interact with it)

Experiment with searching content on LinkedIn, and you can use strategies such as searching by keyword. Brainstorm the keywords and content themes that interest your customers. For example, you can enter a keyword such as "marketing" or "proteomics" and quickly scan content that is relevant to your industry. Using the pull-down menus, you can filter by date, by connection level, and by industry. Here's a screenshot for *Content > Proteomics*:



Scroll through it and comment on relevant articles by folks in your industry. For any person, you can hover over their name and see whether they are a 1st, 2nd, or 3rd-level contact, as well as view shared connections. Here's a screenshot:



Notice how Kursad is a 2nd-level contact, which means I can then comment on his post or article, get his attention, and possibly begin a relationship. I can also see 1st-level connections that he and I share. Identifying and interacting with relevant contacts through second or third-level connections is another excellent way to expand and grow your network on LinkedIn.

I can either add a comment or I can reply to the comments of others. Again, each time I comment or reply, LinkedIn will notify the recipient, thus building buzz around me on LinkedIn and providing me with opportunities to connect with more people. Obviously, do not spam people – be useful and engaging, so focus on content in which you actually have something worthwhile to contribute!

Hashtags on LinkedIn

LinkedIn also features **hashtags**, which are "conversation themes" similar to their use on X. With your research from "content marketing," you should have identified "content themes" that matter to your customers. Translate these into hashtags through a bit of research on LinkedIn. Search for "posts" on your content themes and browse for hashtags. Take a starter hashtag, such as "#webdesign," and search for it. Alternatively, use X to search for X, and then check if hashtags that appear on X also have a lot of activity on LinkedIn. Make a list of relevant hashtags, and even bookmark them to your Start.me page, so you can easily zero in on relevant hashtags (and conversations) on LinkedIn.

While you can no longer easily "follow" a hashtag, you can use Start.me to "bookmark" hashtags you want to follow. First, conduct a search on LinkedIn for hashtags such as *#smallbusiness* or *#webdesign*. Then take the URL and either bookmark it or save it to your *Start.me* page. You can also filter by posts and contacts; for example, a search might be "the hashtag *#smallbusiness* in posts by 1st level contacts." In this way, if you want to follow and interact with a timely topic, you can expedite it by pre-saving the search.

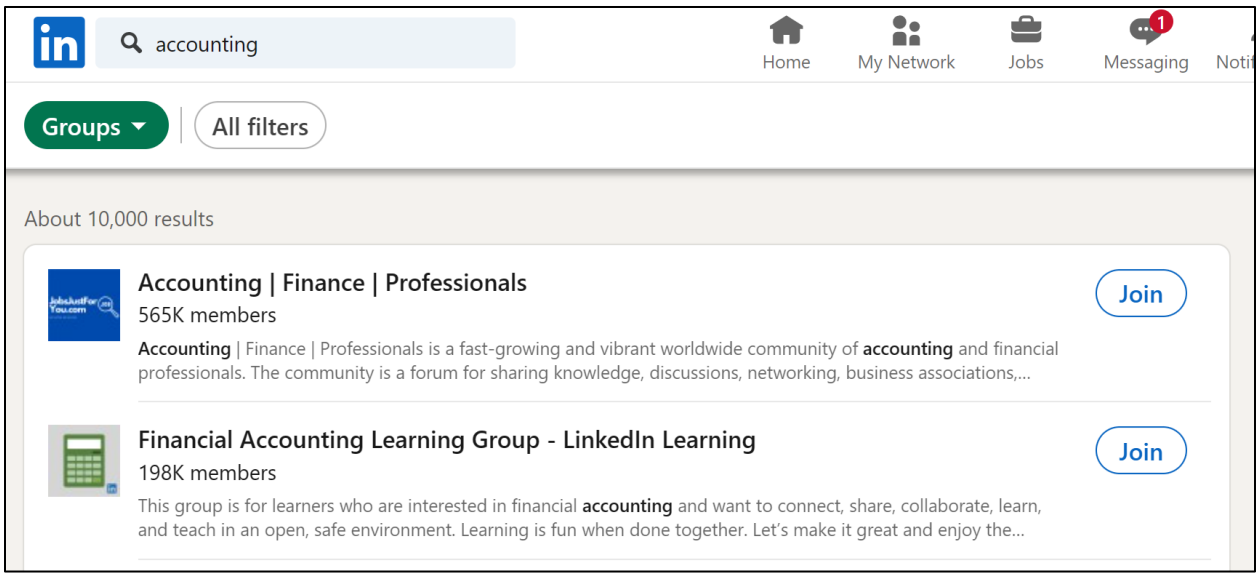
You can also visit LinkedIn's "Discover Hub" by clicking on "Discover More" or visit this (hidden) URL: **https://jmlinks.com/73z**. Via the "Discover Hub," you can manage contacts, groups, hashtags, and other features that help you "discover" content.

Returning to hashtags as part of your content marketing strategy, you can drill into a hashtag such as *#proteomics* or *#petroleum* and quickly find content from others to like, comment on, and share, thus building your own visibility quickly and efficiently. This "**interactive content**" strategy is a real time-saver for your LinkedIn outreach.

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 "breakout" 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 for becoming a LinkedIn 1st-level connection.

To find relevant groups, search LinkedIn by keyword and then click on "Groups." Here's a screenshot for a search for the keyword theme, "accounting" and then "groups" on LinkedIn:



Groups can be standard, open, or closed, meaning that for some groups, you must ask to join, while for others, you can join without invitation. By clicking "Ask to join," you are requesting that the group moderator approve your membership.

Once you've joined a group, you may see posts from group members in your news feed, or you can click on groups by going to *My Network* > *Groups*. You can also visit **https://www.linkedin.com/groups/** as LinkedIn makes it somewhat challenging to find your groups. To learn more about LinkedIn groups, read the official help file at **https://jmlinks.com/31j**. You can start a group (on a theme that matters to you and your customers or a branded group around your company's products and services) by clicking "create group."

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 ongoing discussions, and post informative and helpful content. It's a soft-sell environment. Let group members recognize your intelligence and value, 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 **TO-DO** 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 the group is closed).
- **Monitor** and begin to **participate**.
- Diplomatically position yourself (and your company) as a **helpful expert**.

Join the Groups of Your Customers

Here's a pro tip. Don't just join groups that are relevant to your professional interests; join groups that 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.

Your to-dos here are thus:

1. Identify keywords *relevant to your customers* (i.e., pain points or desires that they have and might be joining LinkedIn groups to explore).
2. Identify LinkedIn groups that your customers are joining.
3. Join those groups yourself.
4. Participate in a helpful way in these groups. Don't be spammy!
5. Interact with and connect with potential customers as you participate in these groups as a "helpful expert."

By joining groups *relevant to your customers* and being a "helpful expert" in those customer-facing groups, you can build your brand and leverage LinkedIn far more effectively than by joining groups *of your peers (and competitors)*.

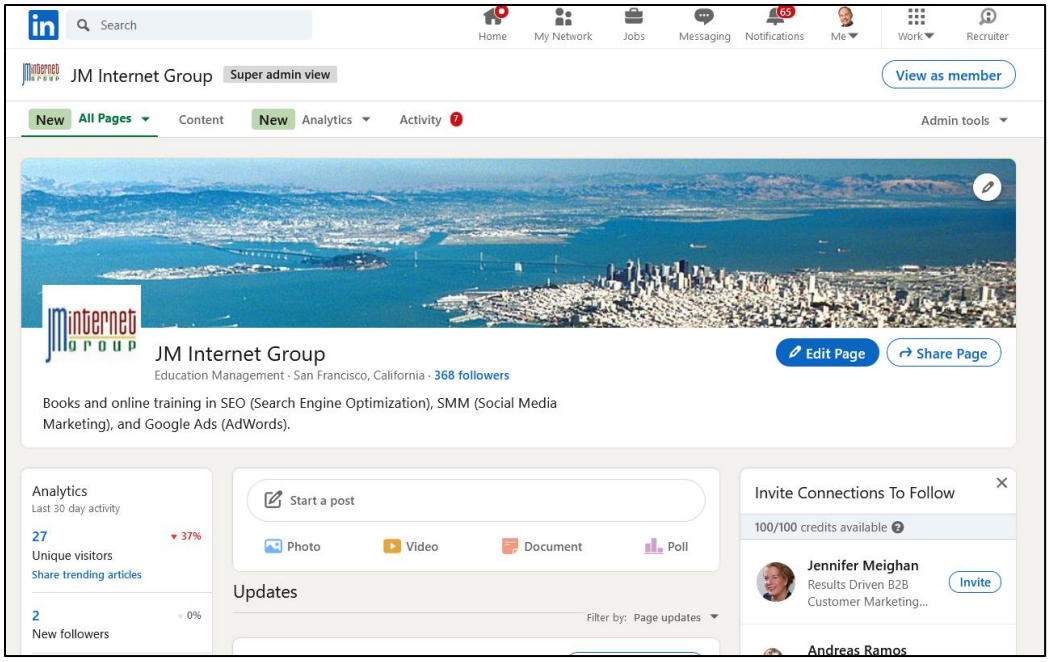
» USE LINKEDIN COMPANY PAGES

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 **https://jmlinks.com/3h**. The steps to start a business Page on LinkedIn are:

1. Sign in to your personal profile.
2. Click on Work at the far right, top, and then "Create a company page" at the bottom, or go to **https://jmlinks.com/3j**.
3. Add your company name and email address, ensuring they match the domain of your company website.
4. Enter your company name.
5. Enter your designated Admins.

Now that you have created a company Page, it's time to optimize it. Log in to your personal profile first. Next, click on Me and the pull-down arrow. Find your company

on the list as indicated by *Company Page*. You can also search for your company by name and click "Manage Page." Next, when you're on your Company Page, click on the various "pencil" icons you'll see throughout. These allow you to update your background photo, company description, and specialties. Here's a screenshot:



Click on the "pencil" at the far right to edit your Page, including your tabs. There's not much to a LinkedIn Company Page. You can only optimize:

- **Page Info**. Enter or adjust your company name accordingly.
- **Buttons**. Add specific buttons with links.
- **About**. Enter a keyword-heavy yet relevant description of your company. Explain your value proposition: what can you do for LinkedIn members?
    - **Description**. Describe what your company does; focus on what you do for customers.
    - **Other Items**. Enter your website URL, phone, industry, company size, company type, years founded, etc.
    - **Specialties**. Enter keywords that match what your company does.
    - **Hashtags**. Enter hashtags that match your business focus.

    - **Featured Groups**. Enter groups that match what your company does.

- **Designated Admins**. Located under *Admin Tools* > *Manage*, you can add or remove Admins here. Any Admin has complete control of the page; so if you terminate an employee, remove them first!
- **Cover 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.

For a fee, you can add a "career" tab to your LinkedIn Company Page as well as a "Life" tab. These are useful only if your company is using LinkedIn to recruit employees, not for marketing to customers. Learn more about LinkedIn company pages at **https://jmlinks.com/53j**.

The reality, however, 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 **https://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 key is to identify interesting and engaging content (both your own and that of others) to post on 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 articles, 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 levels.

To share a *post*, log in to your Company Page and click on "Start a post" link. Just as with a personal profile, you can share either text, text with a photo, video, or link to an external website or native video. Company Pages can now post articles on LinkedIn;

however, I would still recommend that key individuals (such as your CEO) post your articles, as people, not companies, typically write articles.

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 either on YouTube or native to LinkedIn, infographics / instructographics, reports, eBooks, and 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, useful, download our free eBook, useful, useful, useful, useful, useful, useful, visit us at the trade show...*

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, post it not only to your company's LinkedIn page but also have key employees share it as an update on their own LinkedIn profiles.

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. Find the update, click the "three dots," and then "Pin to top."

Here are some examples of effective LinkedIn company pages:

- Thermo Fischer Scientific at **https://jmlinks.com/36k**.
- Intel Corporation at **https://jmlinks.com/36m.**

- Bayer at **https://jmlinks.com/53k**.
- Social Media Examiner **https://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"

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. You'll also find that the organic reach of business Pages on LinkedIn dwarfs that of business Pages on Facebook.

In summary, if your business is business-to-business, such as professional services like Web design, accounting, business attorneys, computer services, SEO, social media marketing, or marketing services, 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, set up a company Page, and begun to populate it with posts on a regular basis, you've essentially "set up" your social media party on LinkedIn. 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 offer yummy food and entertainment for people to show up and stay. 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's LinkedIn page?

People on LinkedIn are seeking informative, educational, useful, and professional content relevant to their industry and job, enabling them to stay informed and educated. 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 employee Profile(s) and company Page(s) 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 are attending the industry trade show (for example), be sure that the employees staffing the booth recommends to visitors that they "connect" with your employees and "follow" your business's 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.* If you attend a trade show, have a real-world office, meet customers, face-to-face, ask them to connect on LinkedIn.
- **Real World Connections**. Motivate each employee to connect with everyone they encounter in the business world – fellow employees, friends at other companies, customers, partners, and so on. Make "let's connect on LinkedIn" a part of your business strategy.
- **Cross-Promotion**. Link your website to your LinkedIn profiles and Page, your blog posts to your profiles and Page, your X to your profiles and Page, etc. Notice how big brands like Intel (**http://www.intel.com/**) do this: one digital property promotes another.
- **Content**. Don't think of content on LinkedIn as posting it and forgetting about it. Instead, think about content as a promotion strategy. Post interesting and engaging content, and then respond to people as they interact with it. Additionally, work on interactive content: search LinkedIn frequently for discussions about topics that matter to you and your business. Chime in with your two cents. Being interactive with content on LinkedIn is a promotion strategy as much as a content strategy.
- **Hashtags**. Hashtags remain easy and influential, so include relevant #hashtags in your posts. To find them, search the existing posts of others by keyword, look

for the "#" symbol, and guess at them (e.g., #organic). Once you follow a hashtag, you'll see it on the far left of your feed.

- **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 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 articles are especially useful for this, as are LinkedIn groups. Internal promotion is not particularly strong on LinkedIn, but it should still be considered.
- **LinkedIn Search and Connect**. Don't be spammy, but you can search for target customers on LinkedIn, have a "carrot" (such as a free eBook or Webinar), and ask them to connect. Limit this to ten or so per week, but it's a way to slowly and steadily build up your first-level connections.
- **Leverage your Customers**. People who have already 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 on LinkedIn 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 LinkedIn Page content is through **advertising**. LinkedIn offers highly focused targeting options for its ads. Here are the basic options:

Boosting Posts. On your LinkedIn company page, find a post. At the top of the post, click on the blue "Boost" button and follow the instructions.

Sponsored Content. Visit LinkedIn for business at **https://business.linkedin.com/** and click on "marketing solutions" and then "advertising." These ads are generally managed through LinkedIn Campaign Manager and operate similarly to Facebook ads.

Dynamic Ads. Let LinkedIn AI do the hard work and create ads for you and your business Page.

Text Ads. These ads appear at the far right of the LinkedIn screen, in the app, and are links to external websites. This is a great way to promote a business webinar, eBook, or a lead generation form.

Sponsored Messaging and InMail. LinkedIn allows you to send "Sponsored Messaging," which is a type of email marketing. Yes, it's a bit spammy, but you can essentially use LinkedIn to send out targeted (unsolicited) messages to prospects. (Note: "Sponsored Messaging" ads are available both to Pages and to Profiles, making this an option unique to LinkedIn – advertising the content of a "person" and not a "brand").

You can learn more about LinkedIn Ads for LinkedIn Pages at **https://jmlinks.com/74a**. For a quick summary of the available ad formats, visit **https://jmlinks.com/76t**.

We'll discuss LinkedIn targeting in a moment, but let's look at these options not from the perspective of the format but rather from the perspective of your advertising objective:

Objective #1: Use LinkedIn to Promote Your Website. Like most social networks, LinkedIn makes it easy for you to set up an ad that goes FROM LinkedIn TO your website. An example might be setting up an ad on LinkedIn to promote a webinar on a new product. You'd set up a demographic target (such as people in the Proteomics industry), set up a "text ad" on LinkedIn, and then pay by click. LinkedIn would show your text-based ad to people who are in the Proteomics industry, and they'd click over to your website and register for your webinar. Ads appear at the top and top right on LinkedIn.

Objective #2: Use LinkedIn to Promote Your Posts and Company Page. Here, you're using LinkedIn advertising to grow the follower base of your Company Page and/or to boost the reach of posts by your Page. You'd set up a demographic target (such as people in the Proteomics industry), boost the post, and LinkedIn would promote the Post and/or your Page to persons who would

see (and hopefully engage with) your content. Note: within a Post, click on the "Sponsor now" link at the top to "boost" a post (that is, advertise it).

Objective #3: Use LinkedIn to Generate Targeted Leads. Here, your objective is a little spammy. LinkedIn will allow you to send "Message Ads" to members, similar to "InMail." These ads appear via the "messaging" function on LinkedIn. An example here would be to send personal invitations via "Message Ads" to professors and scientists in the Proteomics industry, inviting them to an online Webinar on industry trends.

The confusing concept in LinkedIn ads is "who" is going to advertise. This can be either "as a company Page" or "as a Company representative," such as the CEO. The former is Page-based advertising. The latter is Profile-based advertising. Features like "boosting a post" are generally available only to Pages, while "Sponsored Messaging" and "Inmail" are available more to Profiles.

Let's look at each.

Page-based Advertising

Like business Pages on Facebook, businesses on LinkedIn can both "boost" posts and create "targeted ads." We'll discuss targeting in a moment, but the basic structure and concepts are the same as on Facebook.

Boosting a post is the same process as on Facebook. Find a post that you have already submitted organically. Click the "Boost" button and follow the steps to boost the post. You then reach the "audiences" section and can "boost" a post based on audience criteria, such as industries, job functions, titles, or interests. LinkedIn has two new "advanced" features: "Automatic Audience Expansion" (similar to Lookalike Audiences on Facebook) and the "LinkedIn Audience Network," which includes non-LinkedIn websites and blogs. I do not recommend the "LinkedIn Audience Network" as an external ads network, as Google, Facebook, and LinkedIn's "external networks" are plagued with bots and spam. If you do use them, do so at your own risk and closely monitor their performance. As for "audience expansion," that is more of an AI feature, which, again, I would not recommend using. At a minimum, I would recommend segregating your targeting methods to enable you to see the performance of LinkedIn, LinkedIn's "Audience Expansion" feature, and external network performance.

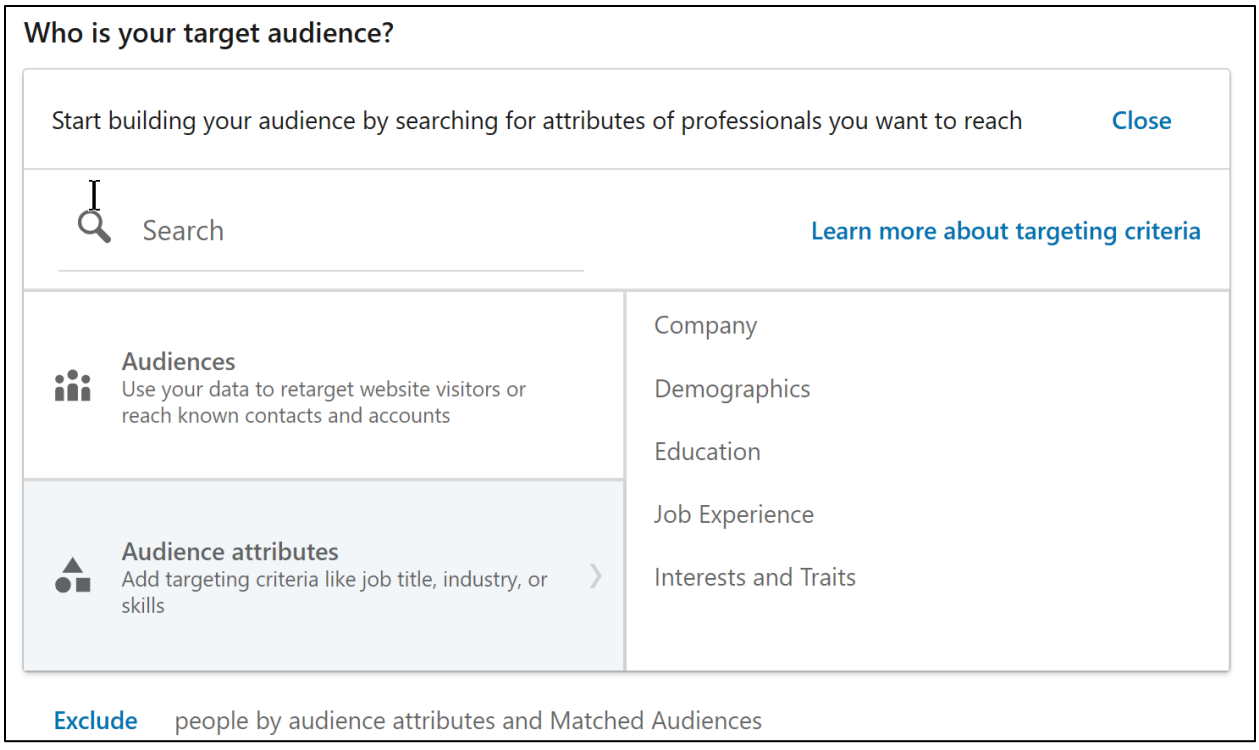
Similar to Facebook, LinkedIn has a tool called "Campaign Manager," available at **https://www.linkedin.com/campaignmanager/**. Here, you have access to all advertising features and can set up Campaign Groups, Campaigns, and *Ads*. The nomenclature is different than on Meta, but the concept is the same. Here, you have an

all-in-one interface to manage robust ads throughout LinkedIn, from "boosting posts" to independent ads. LinkedIn has also launched a "Business Manager" feature, again similar to Meta. Finally, inside of "Campaign Manager," click on *Plan* > *Audiences* to find Audiences (again, conceptually identical to Meta advertising options).

Audiences on LinkedIn

Here, again, LinkedIn has followed Meta's lead both in terminology and structure. "Audiences" on LinkedIn are the targets for your ads – that is, people who live in Dallas and work for accounting firms, people who are "marketing managers" and live in Nebraska, people throughout the country who are interested in "Artificial Intelligence" for business, people who have visited your website, and so forth. Within Campaign Manager, click on *Plan* > *Audiences*. Then, on the right, you'll see the Audience window open, displaying its parameters. As with Meta, you can create an "audience" and then attach that audience to either a "boosted post" or an "ad."

Beyond geographic criteria (i.e., people in the US, people in Texas, people in Albuquerque, etc.), you can either choose "Audiences" (i.e., your own data such as the LinkedIn Insights tag or CAPI data from your website or customer matching emails), or "Audience attributes" (which is LinkedIn data on job titles, ages, locations, interests, etc.). Here's a screenshot:



LinkedIn has a robust discussion on ad targeting options at **https://jmlinks.com/74b**. Similar to Meta, LinkedIn has both "Pixel" and "CAPI" options to link your website activity to customers on LinkedIn. The "Pixel" option is called the "LinkedIn Insight Tag" (**https://jmlinks.com/74c**), and the CAPI option is called the LinkedIn Conversions API (**https://jmlinks.com/74d**). Here, LinkedIn confronts the same problem as Meta: Apple iOS is non-cooperative over tracking, so both the "Insight Tag" and "CAPI" must be implemented to attempt to tie website behavior to LinkedIn behavior. Again, consult your resident computer nerd to implement these features, or visit a site such as Fiverr and search for people who have experience with "LinkedIn Insights Tag" or "LinkedIn CAPI." You can also upload customer email lists, as on Meta.

Once you have successfully implemented these features, you can tie website behavior to audiences on LinkedIn and then combine and refine all forms of targeting. Similarly to Meta, LinkedIn AI can create "Lookalike" or "Predictive" audiences based on your existing customers.

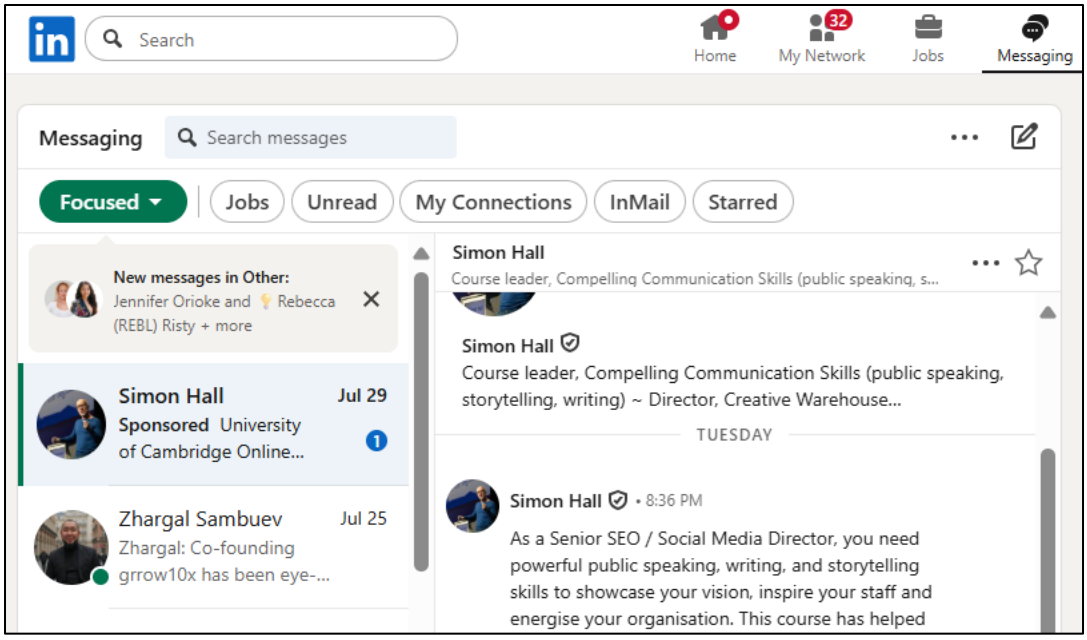
Message Ads: Both Pages and Profiles

Sponsored messaging is unique to LinkedIn. While Meta has "Facebook Messenger" and "WhatsApp" ads, these ads appear as intrusive ads within the user message feed. They do not appear "as if" they are true messages in any real sense. In addition, people on Meta are messaging friends and family about personal issues, rather than business- or consumer-oriented matters.

On LinkedIn, in contrast, people are in business mode, and messages between people often do involve business decisions. A person seeking WordPress website design, for example, might reach out to potential contractors and discuss their website project. The "tone" and "content" of messages on LinkedIn are business-oriented.

Not surprisingly, "Sponsored Messaging" ads and "InMail" ads can be very effective on LinkedIn. A common use case is to invite people to a "free webinar" or have a "carrot" such as an eBook or free consultation. Think of "InMail" as a one-at-a-time option and "Sponsored Messaging" as a shotgun advertising method, with audience targeting as discussed above.

Messaging Ads appear on LinkedIn under "Messaging" with the notation "Sponsored." Here's a screenshot example from my own "messaging" Inbox:



Simon Hall is essentially sending me an unsolicited InMail message on a new course. He's fishing for qualified leads via LinkedIn. Sponsored Messaging ads can be set up via Campaign Manager. You can even customize each message similarly to a mail merge, so that it appears with a personalized greeting, subject, and more.

Alternatively, if you have a LinkedIn Premium account (**https://premium.linkedin.com/**), you can use Sales Navigator to create specific searches and outreach campaigns. Here, you generally send InMails one at a time. Each premium account comes with a finite number of "included" InMails each month, and you can also purchase additional InMails. The best way to use this would be to have a "carrot" such as a free webinar or eBook, use the LinkedIn Profile of a senior management person (e.g., the CEO, CFO, CMO, or perhaps the Engineering Manager), and then identify targets and send each of them a "personalized" invitation to your webinar or eBook.

For Sponsored Messaging and InMails, here are your steps:

1. Brainstorm a "carrot" such as a free webinar, eBook, or free consultation. Think of something enticing and free that will "break the ice" of creating a customer relationship.
2. Identify your LinkedIn "audience" either via the "audience" feature in Campaign Manager or via the search function in Sales Navigator.

3. Write a template for your message as in "Dear X, I see you are involved in small business. I'd like to invite you to our webinar on tax changes for 2024 impacting small business owners. If you're interested, message me back for date and details."
4. Create either a Sponsored Messaging ad with targets (and deploy via Campaign Manager) or create an InMail system, wherein you do it one at a time.
5. Measure your results, spend, and return on investment.

Messaging Ads are not cheap, but if you are in a B2B space and want to use LinkedIn for "Lead Generation," they are a unique way to target prospects.

Use Your Company Page and Employee Profiles in Tandem

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 utilize your company's LinkedIn Page to support your employees' posts and articles? Here's how:

1. Have the employee **post** to their **blog** and/or
    - Have the employee create an **article** for LinkedIn.
    - Find the link to that article by clicking on the top right, three dots.
2. **Pay to advertise** this content via your company account by following the steps on LinkedIn's Campaign Manager page (**https://jmlinks.com/53g**).

On organic posts, use your company-internal communication system (such as company-wide email) to ask company employees to "like," "comment," and "share" posts by the Company Page. In the reverse, use the Company Page to "like," "comment," and "share" the posts and articles of key employees. And, if you have budget, use the Company Page to point to posts and articles by key employees and "boost" these via advertising to key prospects.

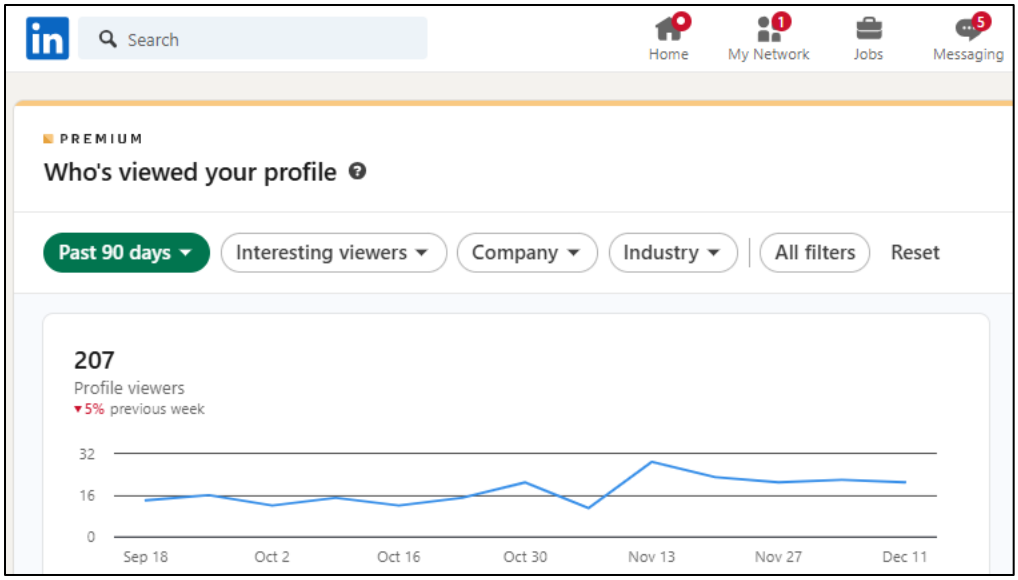
Remember: **LinkedIn is a "team" sport!**

» MEASURING YOUR RESULTS

LinkedIn offers more metrics at the company level than at the personal profile level.

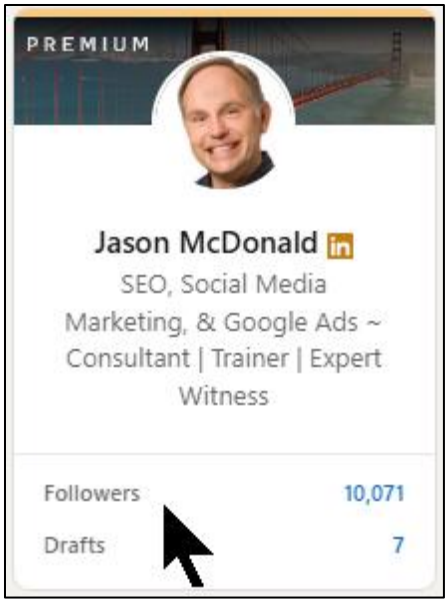
LinkedIn Profiles

First, let's look at the profile level. Log in to LinkedIn. Then, on the far left, find "Who's viewed your profile" and click on it. If you don't see it there, just visit **https://jmlinks.com/46d**. Here's a screenshot:



This will show you data on who's viewed your profile. Depending on whether you have a free or premium account, you can see who's viewed your profile and then reach out to them with a connection request.

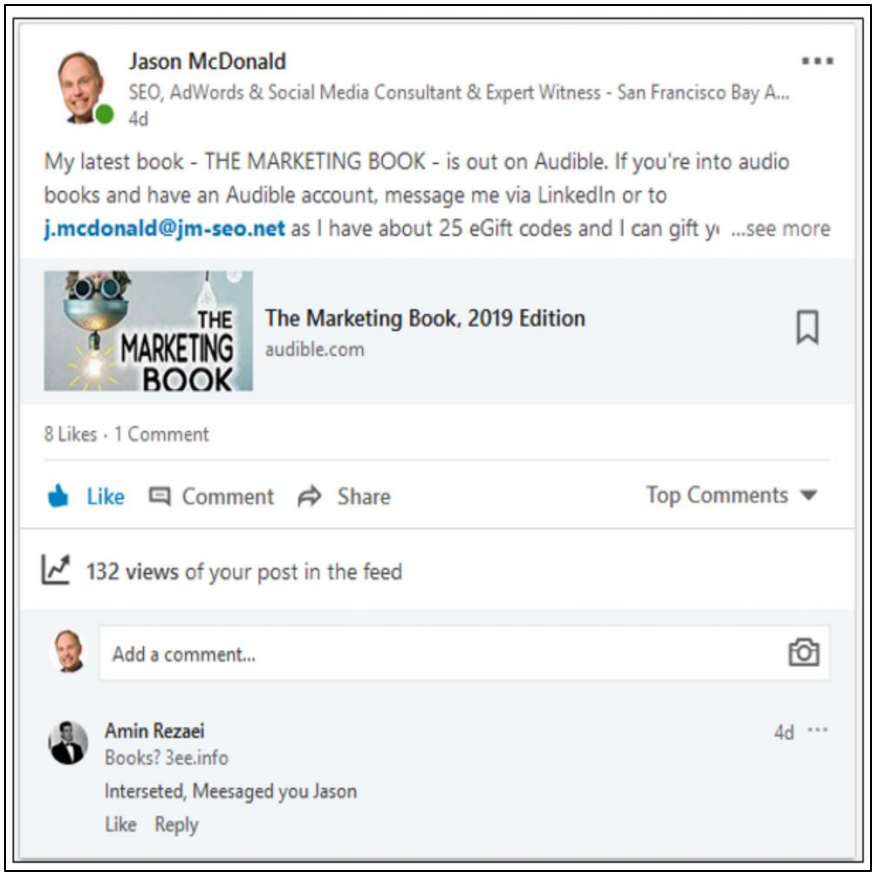
You can also see your follower count at the top left. Click on "Posts and Activities" and then on "Followers." Here's a screenshot:



Right underneath that, click on "your followers," and you can see who's following you. You can then follow them back. To see your connections, go to *LinkedIn* > *Me* > *View Profile* > *Connections*. Here's a screenshot:

LinkedIn Posts

You can also see data at the post level. For example, here's a screenshot of a post with data:



You can see that this post had 132 views, 8 likes, and 1 comment, for example. You can also toggle between articles and posts at the top; remember that an article is a post to LinkedIn's internal blog system. As with posts, you can view the number of views, likes, comments, and shares.

If you post an article to LinkedIn, stats on its performance will also be visible. Go to *LinkedIn* > *Me* > *Posts and Activity* > *Articles* to see this data. There isn't yet a video tab, so you have to scroll through "All activity" to find any native videos you uploaded. For any piece of content, you can see likes, comments, and shares. Your objective is to determine what your audience likes and provide them with more of it.

LinkedIn Pages

LinkedIn Page data is more robust. If you are logged in as the company, 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.

In summary, LinkedIn allows you to see how people interact with your Page and updates, as well as those made by individual profiles.

»» CHECKLIST: LINKEDIN ACTION ITEMS

Test your knowledge of LinkedIn! Take the *LinkedIn marketing quiz* at **https://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? Why?
  - ❑ Identify a few ***customer profiles*** that match your *buyer personas* and determine how active they are.
  - ❑ Identify **companies** to "reverse engineer" that 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. If you're positioning a Profile as a "thought leader," enable "Professional Mode" for that Profile and/or upgrade to a paid account.
- ❑ 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 on LinkedIn, wine and cheese events at industry trade shows, etc.).
  - ❑ Begin sharing useful posts aimed at your target customers on LinkedIn.
  - ❑ Begin posting useful articles to LinkedIn aimed at your target customers.
  - ❑ Begin posting "native video" on LinkedIn.
- ❑ 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.

- ❑ Evaluate whether **LinkedIn advertising,** such as boosted content or "Messaging Ads" to targeted prospects, might help your LinkedIn efforts for a decent ROI.
- ❑ **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 **https://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 **TO-DO**, download the **LinkedIn Marketing Plan Worksheet**. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), 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.

7
X

Do you Tweet? Should you? X (formerly known as "Twitter") is a problematic yet still relevant social platform. Its billionaire owner, Elon Musk, is a lightning rod for controversy and a self-avowed "free speech absolutist." We'll talk about Mr. Musk in a moment, but for now, recognize the fundamental marketing reality of X. *Katy Perry posts. The Pope tweets. CBS News tweets.* And so the logic goes, *you'd better tweet, too*. On the other hand, X is so full of noise, news, and craziness that it isn't necessarily a good marketing venue for many businesses. In fact, many businesses post, and no one listens, so X becomes a complete zero in terms of return on investment. In the new nomenclature, a "tweet" is supposed to be called a "post," but many users continue to use the old nomenclature. Go figure.

X can be an **effective marketing channel** for your business, or X can be a **massive waste of time**. Which is it? Should you use X, and if so, how? The answer, of course, is "it depends." It depends on whether your customers are on X and whether you can systematically implement an X marketing strategy. Given the high profile of billionaire owner Elon Musk, X is in turmoil, but it is not going away any time soon.

In this Chapter, you'll learn how X works, how to figure out if X is a good opportunity for your business, how to set up your X account, and – most importantly – how to post effectively. Throughout, I will identify 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 use X for marketing as opposed to just pecking endlessly at 280 characters. I will try to use the new term "X" throughout the Chapter, but on occasion, I will use the term "Twitter" as well as "tweet" rather than "post." Among the brand challenges for "X" is that the verb "to tweet" remains the standard way to refer to posts on the platform, even though we are all supposed to be Musk's minions and agree to his unusual fantasies about the platform (and life).

Let's get started!

TO-DO LIST:

- » Pay Attention to Elon Musk
- » Explore How X Works
- » Inventory Likes and Dislikes on X

» Create X-friendly Content

» Tweet to Journalists, Bloggers, and Influencers

» Brainstorm and Execute a Tweeting Strategy

» Promote Your X Account and Tweets

» Advertise on X

» Measure your Results

»» Checklist: X Action Items

»» Deliverable: An X Marketing Plan

» Pay Attention to Elon Musk

As is true for Meta and YouTube (Google), X is under the control of a billionaire. Thus, if you market on Facebook and Instagram, you are playing in Zuckerberg's sandbox. If you market on YouTube or Google, you are playing in Sergey Brin's and Larry Page's sandbox, and if you are marketing on X, you are playing in Musk's sandbox. Elon Musk's on-again, off-again relationship with politics means turbulence for X, even as many of its valuable marketing uses remain. Competitors BlueSky and Threads have not achieved significant success. Musk, whatever you think of him politically, is a rather weird guy (for example, he has fourteen kids by four different women, with names like "X" or "Tau," he launched a Tesla into space, and he believes we live in a "simulation" like "The Matrix").

Be all of that as it may, this Chapter explores using X (Twitter) for marketing with the caveat that things can (and probably will) change without notice.

» Explore How X Works

One easy way to understand X is to think of it as a **microblogging** platform. Blogs are all about having inspiration for a blog post, composing a strong headline, and writing detailed paragraphs about the topic. X is very similar, just a lot shorter - 280 characters, to be exact.

Let's compare writing a blog post and composing a tweet.

When you write a blog post, you a) conceptualize a **topic** (*one of interest to your target audience*), b) write a **headline** and the **blog post** itself, c) append an **image** or perhaps embed a **video** as an optional feature, and d) **promote** the post. Similarly, within the constraints of a 280-character post, you a) conceptualize a **topic** of interest to your (potential) followers, b) write a **headline**/**post** (they're basically the same on X), c) append an **image** or **video** as an optional element, and d) **promote** your post.

X IS MICROBLOGGING

One difference between X and blogging is that a post often points *outward* to an in-depth blog post, a video, an infographic, or an image. A post can be just a "headline" pointing out the "rest of the story." Think of X as a "headline" service pointing to your blog, offer on your e-commerce website, YouTube videos, etc. However, posts can also stand alone. Tweets can also be conversational, as when one person responds to others, and whole groups of people engage in a conversation through tweeting.

As for content, posts can be:

- **Just text**. Start typing a thought, idea, reaction, news announcement, or whatever, up to 280 characters. (X Blue accounts allow up to 10,000 characters).
- **A photo or image**. You can upload a photo from your computer or via the X app on your phone.
- **A video**. X, like all the platforms, has gone gaga for video. Upload a short video of less than 2 minutes and 20 seconds. You can also "go live" with live video on X.

Check out the official tutorial on how to use X at **https://jmlinks.com/46h**.

X is Like Facebook (and Instagram, LinkedIn, and Pinterest...)

Structurally speaking, X also shares many similarities with other social media. Like Facebook, LinkedIn, Pinterest, and other social media, your X account (a.k.a. "Page") can be "followed" ("liked") by others who are alerted in their news feeds when you post new items. In addition, posts on X can be discovered through *hashtags as well as the recommendation engine (AI). Additionally,* people can *retweet* (repost) your posts, respond to them, or favorite them, thereby drawing the attention of their followers to you.

The names may have changed, but the basic structure of X works pretty much like that of other social media platforms:

- Individuals have *accounts* on X ("Profiles" or "Pages" on Facebook).

    - Companies also have *accounts* on X ("Pages" on Facebook).
- If an individual *follows* your account on X ("likes" your Page on Facebook), then when your company posts, it will appear in the news feed of that individual (technically, their X *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 *bookmarks*, *lists* and *moments*, which are compendia of posts.

The structure of X is thus quite similar to that of Facebook; the major differences are that X is shorter, faster, and noisier than Facebook. Additionally, X is significantly more **conversational** than other platforms. Especially when it comes to politics, pop culture, and trending topics, people go on X to converse – many would say argue – about these topics. X is a rough-and-tumble 24-hour street **conversation**. Thus, for your content marketing strategy, you should focus not just on "your own content" but on "interactive" content – **conversations** you can have with prospects, customers, superfans, and "influencers" such as bloggers, journalists, or other superstars in your industry.

X IS A CONVERSATION!

What's Unique about X?

X is the most open of all social media. Anyone can set up an X account in literally minutes and start tweeting – there's no required 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 posts. They can even contact you without your pre-approval. Let me repeat these important X facts:

> **Anyone** can instantly set up an X account and start tweeting; no authentication required;

Anyone can listen in to anyone on X: no friending required, and

Anyone can converse with **anyone** via X: it's completely open.

X IS OPEN

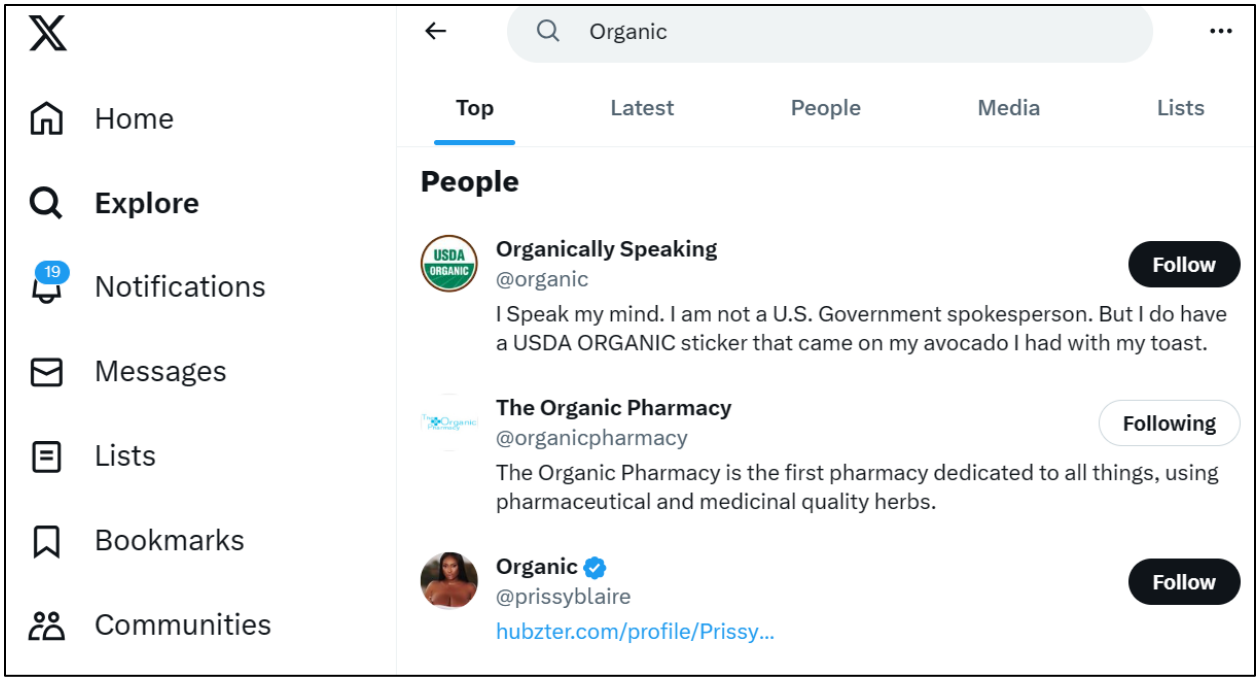
So, anyone can talk on X, a fact that, in combination with its focus on news and pop culture, may explain why X is the most "no holds barred" of all the social media. Because it is so open, however, X also offers unique marketing opportunities to reach "strangers" who are journalists, bloggers, influencers, and others with some clout. You can post to journalists, the President (or not), Congresspeople, bloggers, the followers of your competitors, anyone, and everyone – and everyone can listen in and discover new and engaging content. X's openness gives it an unrivaled reach compared with competitors like Facebook or LinkedIn. Because X is so open, you can reach customers who have never heard of you – not "liked" you in a Facebook sense, not "followed" you in a LinkedIn sense, and not even "engaged" with you in a TikTok sense.

Many people are posting and engaging on X (including bots, which are automated robots pretending to be human), but is anyone tru*ly 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 X. As with all social media, your first to-do is to investigate whether your target audience is on X and, if so, how you can reach them as a marketer.

Identify Companies-to-emulate, Competitors, and Themes

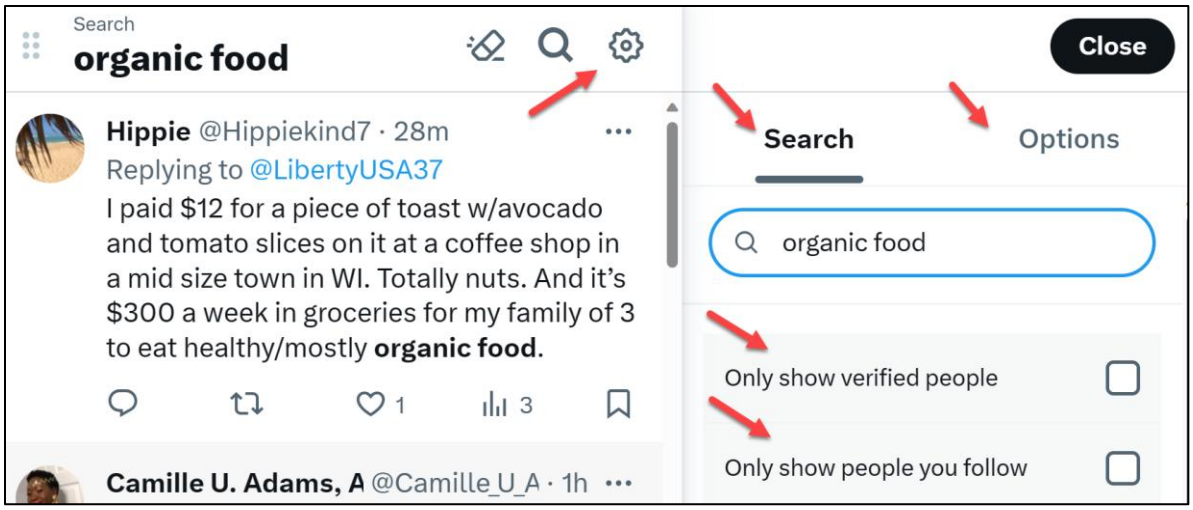
Because of its openness and focus on short, newsy content, X is a blizzard of information with lots of noise obscuring the interesting stuff. Whereas Facebook is all about friends, family, and fun, "as if" you are at a company picnic or family reunion, X is "as if" you were listening to all talk radio stations and all cable TV stations at the same time.

To get started, search for competitors and companies-to-emulate. On the desktop and the app, click the "magnifying glass" and start a search. For instance, type in "organic" and then click over to the people section. Here's a screenshot:



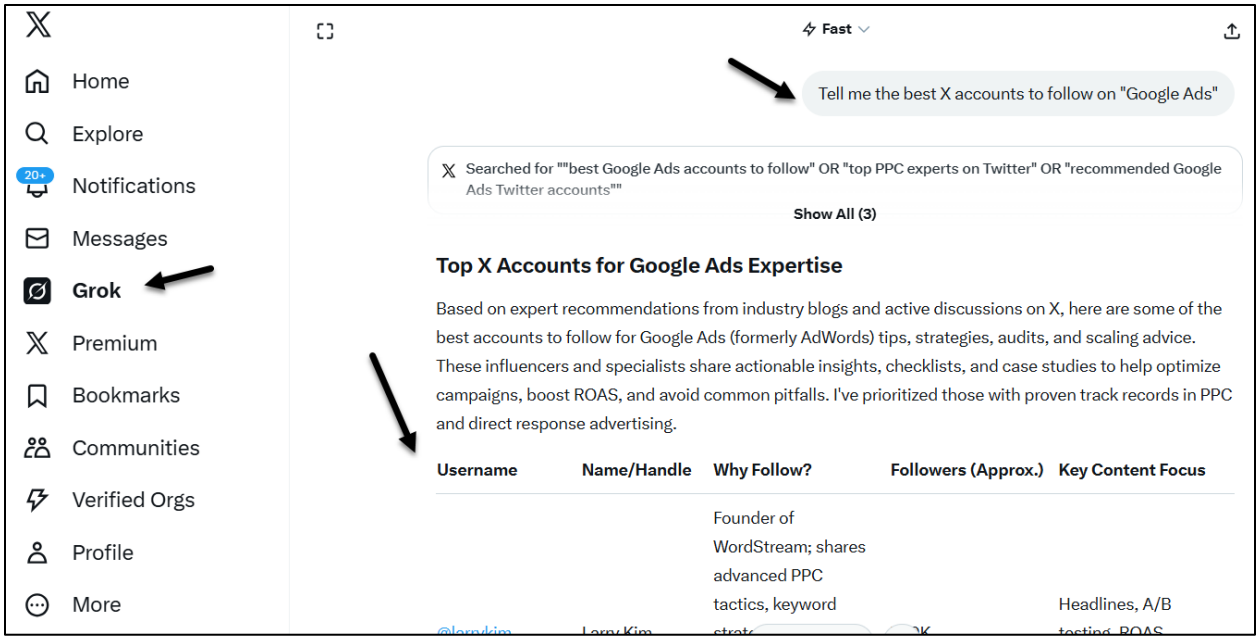
In this way, you can find companies or brands on X that focus on "organic." Then, click on a company, such as @OrganicConsumer, and click the "Follow" button to follow them. Repeat this process with your content themes, looking for both competitors and companies-to-emulate. Start to pay attention to what they are posting, and for any post, you can see impressions, likes, comments, and "retweets" (which is X slang for shares). Here's a screenshot for a post by @OrganicLiveFood on "Fruits that fight Diabetes," showing 5 comments, 170 retweets, 471 likes, and 99 bookmarks:

Here's a power tip. Use X's free tool, X Pro (formerly called TweetDeck) at (**https://pro.x.com/**) and search for your keyword themes, such as "organic food." X Pro creates a "column" for your keyword theme. You can then use the column to monitor conversations on X about this keyword theme. Plus, you can search in this column for posts, accounts, hashtags, and other ongoing conversations about this topic. Here's a screenshot from X Pro with the column search for "organic foods." I have put arrows showing how to search, modify options, and show or do not show verified people or people you follow:



By creating columns for each of your major content themes, you can easily scan for content and use that content for inspiration or for an "interactive" content strategy by liking, commenting on, and retweeting individual posts. If you plan to be a power user on X, I strongly recommend enabling the XPro app on your desktop. To my knowledge, there is no mobile app for XPro; only the app for X is available.

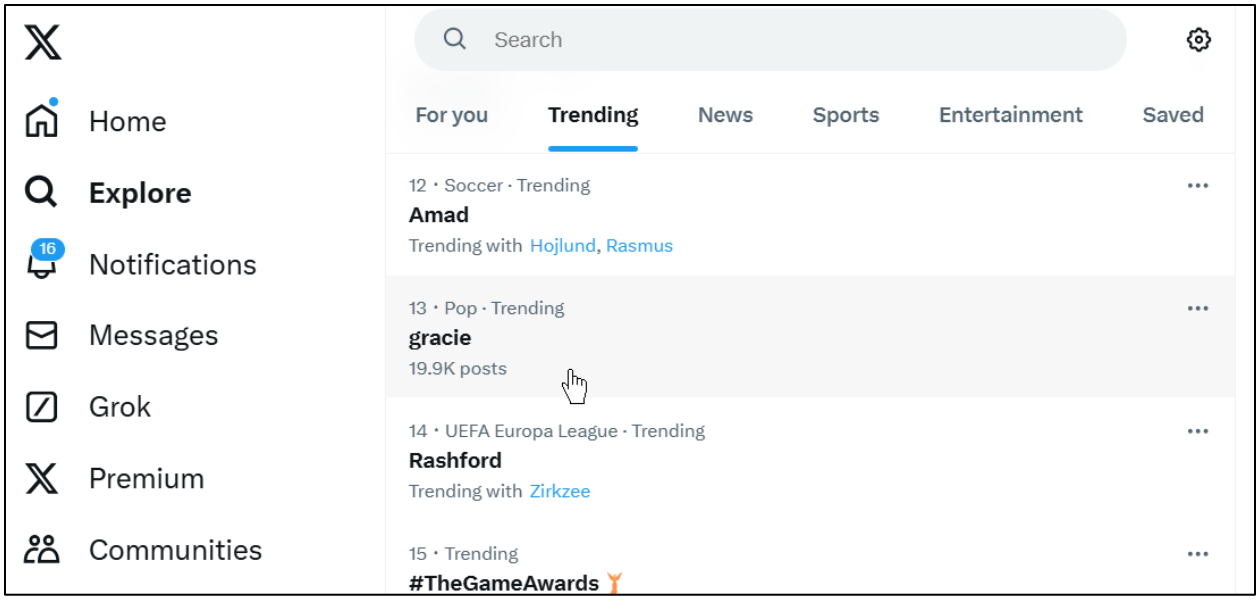
New for 2026, X also has its own AI tool called "Grok." You can see this on the left menu when you log in to X or access it directly at **https://grok.com/**. Grok's competitive advantage is its real-time, newsy focus on X. It's excellent for asking questions about current events and trending politics, but not so much for marketing. You can ask Grok questions, such as "Tell me the best X accounts to follow for 'Google Ads." Here's a screenshot:



Your to-do is to identify competitors and companies to emulate on X. Begin following them and start reverse-engineering their X strategy, which primarily involves their content strategy: their own content, curated content, UGC content, and, most importantly, "interactive" content, as the true superstars on X are conversationalists.

Exploring Trends on X

You can also browse X for trends. On the app, click on the magnifying glass and then click "trending," "news," "sports," "fun," or "entertainment." The X algorithm will provide you with the most popular and trending content by genre. On the desktop, click on the *Explore* icon on the left, and then you'll see "For You," "News," "Sports," etc. Here's a screenshot:



Rather than paying attention to massive pop culture or news trends, I recommend focusing on content themes that matter to your customers. Look for people to follow, companies or brands to emulate, influencers, superfans, and others who are focused on your industry. The trick is to drill down into the niches in your industry and realize that if all you see are the rather silly or outrageous headlines on X, you're missing its opportunities. "Riches are in the niches" on X, very much so.

It should be clear, however, that X is fundamentally a news and conversation app – what's going on in politics, in sports, in entertainment, in pop culture. And, what you don't want to miss, X is a treasure trove of what's going on in your industry – in proteomics, in oil and gas, in marketing, in skincare, etc. X has been, is, and remains the go-to "news" app for specific industries and communities.

X's Culture

X's culture is fast-paced and primarily used to share news (about everything) and/or gossip (about pop culture and politics). It's also rather rude and full of cyberbullying. Inappropriate, mean-spirited comments are rife on X, which is where pop culture is discussed, X is where politics is argued over, X is the 24/7 news cycle on steroids, and X is full of crazy, fun, over-the-top, crude, and inappropriate hashtags and conversations. X is ground zero for political correctness. X is ground zero for AntiFa and the Alt-Right. X is home to insanity, but it is also powerful because of its incredible reach into every nook and cranny of the culture.

X is a complete and utter mess. X makes you believe we are living in the end times. X has been responsible for revolutions and viral cat videos.

I love Twitter! Oops, I mean X.

I hate Twitter! Oops, I mean X.

In fact, X is even home to *Twitter mobs*, which are crowds that attack people who are "beyond the pale," with "pale" being the other side of whatever the frenzied mob doesn't seem to like. If Cancel Culture had a country, X would be its capital.

Is X for You? Tuning In and Tuning Out

With all these pros and cons, the question becomes whether X is for you, whether or not your customers are on X, and – if so, whether you can use it to market to them. If, for example, your business lives in an industry that thrives on news, X may be great for you. For instance, if your business is closely tied to politics, news, or pop culture, X may be crucial to your marketing efforts. If you are a nonprofit that advocates into the public square, X is a must. If you are a politician, you absolutely must be on X. If your business is about coupons, special deals, and foodie events, X may be a fantastic marketing opportunity. If you attend industry trade shows or want to reach specific journalists hungry for story ideas, X can be your secret marketing weapon.

Throughout, keep your eye on how to *tune in* to the appropriate conversations on X and *tune out* the blizzard of useless X noise. Like talk radio or the 365 channels on cable TV, it's all about *tuning in* to an audience to succeed at X marketing.

> *Tune in to X conversations that matter to your business and tune out of X conversations that don't.*

While X is not for the faint of heart, with some skill and knowledge, you can "tune in" to relevant content and conversations for your brand and "tune out" of the over-the-top insanity that gives X a bad reputation.

Sign up for X

If you haven't already signed up for X, go to **https://x.com** or download the app.

The basics of setting up a business X account are as follows:

- **Your Account / Your Username / X Handle**. A username such as **@jasoneg3** becomes your X handle or URL (**https://x.com/jasoneg3**) and shows up in your posts. Choose a short username that reflects your brand identity. **Shorter names are better** because, although they no longer count in the character count, posts are limited to 280 characters, and long usernames look somewhat stupid. 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 XPro (**https://pro.x.com/**) to let multiple people access your account.

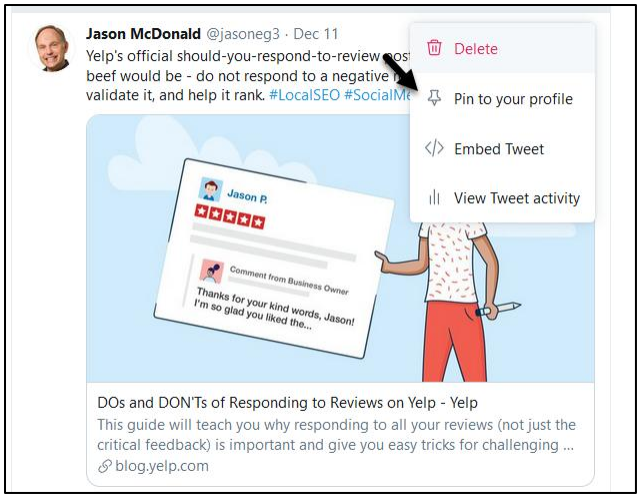
- **Profile Photo**. This is essentially the same as a profile photo on Facebook. The recommended image size is 400 x 400 pixels. It shows on your Tweets when viewed in a follower's news feed.

- **Bio**. You have 160 characters to explain your company brand, products, and/or services. Be sure to include an http:// URL link to your company website. You can insert *#hashtags* and *@mentions* in your bio, and these are now clickable. Branded hashtags have thus come to X bios, just as they have on Instagram.

- **Header Image**. Similar to the Facebook cover photo, you get 1500x500 pixels to run as a banner across your account page.

- **Pinned Post**. You can "pin" a post to the top of your X account so that it appears first when users click on your X page. For example, compose a post that promotes your email newsletter, and then "pin" this to the top of your X account.

Here's a screenshot of how to "pin" a post:



Essentially, find the post you want to pin, click on the downward arrow, and then click on "pin to your profile page."

To access any of the other settings and features, go to your page on X (for example, **http://x.com/yourcompany**), be sure you are logged in, click on the small profile picture at the top right, click "profile," and finally, click on the "edit profile" button in the far right of the screen. If you're logged in, you can also go to **https://jmlinks.com/31v** or **https://x.com/settings/account** when logged in.

Although not much can be customized, in today's era of Internet hacking and piracy, I recommend enabling login verification, which requires a mobile phone code for all new logins.

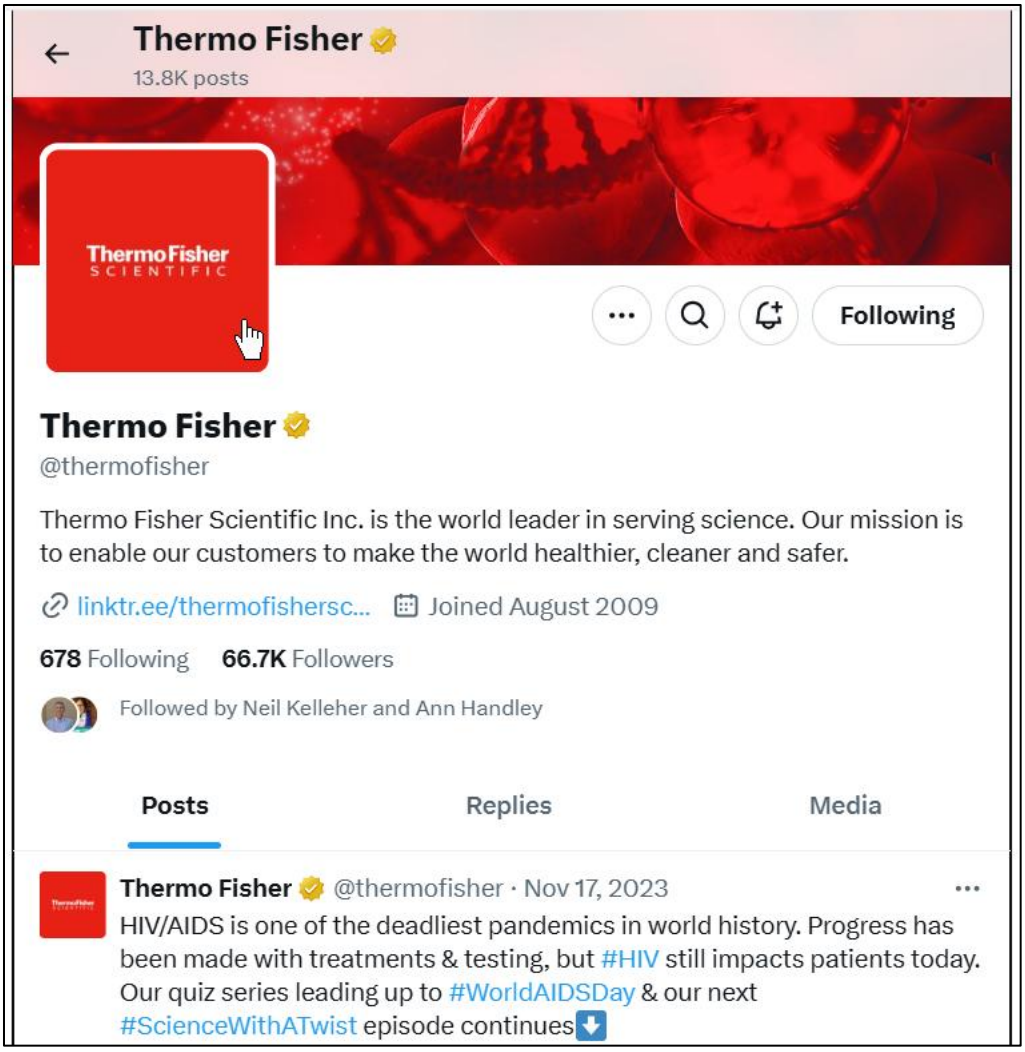
Following and Followers

Now that you've set up your account, you can "follow" people or brands on X by finding their X accounts and clicking on the "follow" link. Similarly, people can follow you on X by doing the same. No approval is necessary –find people or accounts that interest you and click "follow." X is like YouTube or Instagram (and not Facebook or LinkedIn) in that there is no fundamental distinction between a "brand" and a "person" on X. Everyone has an account or handle, so it's *@jasoneg3* (for me as a person) and *@Gucci*(for Gucci as a brand at **https://x.com/gucci**), and they function the same.

As you are logged in to your account (either personal or business, it doesn't matter), start searching for and following persons and brands that interest you. Just remember that outsiders can see who you follow, so if you're going to follow competitors, I'd follow them with your personal account, not your business account.

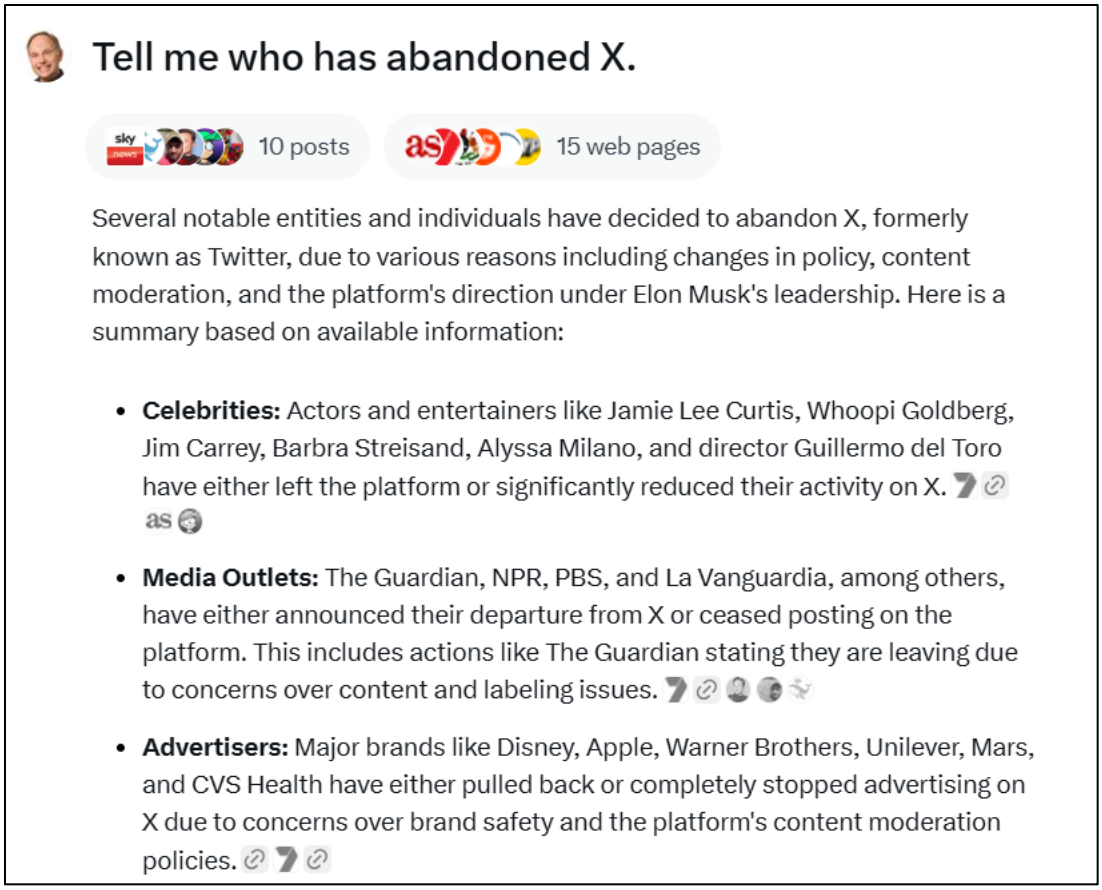
For example, to follow the outdoor product company Bass Pro Shops, search for them by name. You'll end up on **https://x.com/BassProShops**. Then click on the black "Follow" button. Here's a screenshot:

Note: Many companies have abandoned X due to the controversy generated by Musk. Brands like REI and ThermoFisher have gone dark with no explanation. As you look for competitors and companies-to-emulate, please pay attention to their latest posts. Those with moribund accounts will not have any new posts for over a year or so. Thermo Fisher, for example, has abandoned X. Here is a screenshot showing their last post as of November 17, 2023:



Here's the deal, however. Thermo Fisher, as a brand, may have abandoned X, but have its customers? If one searches for hashtags such as #proteomics or #science, they see thousands of up-to-date posts. I would not let one's opinion of Musk interfere with the marketing dynamics of whether or not your customers have abandoned X. X is many things beyond Musk, including, for example, vibrant discussions of proteomics and science. At the very least, make your company's decision to participate or abandon X a well-thought-out marketing decision, not a knee-jerk reaction to politics.

As mentioned above, X has a new tool called "Grok" (**https://x.com/i/grok**). You can ask it questions, and it will return answers. Its strength is in news (including industry news). Here's a screenshot after I asked it to tell me who has abandoned X. It gave a pretty good answer:



Returning to examining accounts to follow, the more followers an account has, the more powerful it is. The more people follow it, and the fewer people it follows, the more powerful it is. If you see an account with approximately the same number of follows as it has followers, then many of its relationships are likely "follow for follow," which is indicative of weakness.

Just as in High School, the most powerful people are followed by "everyone," while they tend only to follow other high-profile people. Here's a screenshot of Kim Kardashian's account on X, showing she has 75.1 million followers and is only following 130:

And here's a screenshot of my account on X, showing I have 2,482 followers and follow 229:

The point here is you can estimate the "influence" of an X account by looking at both the total follower count (Kim Kardashian, 75.1 million; me, 2,482) and the ratio of following to followers. I won't do the math; it's clear who is more powerful on X.

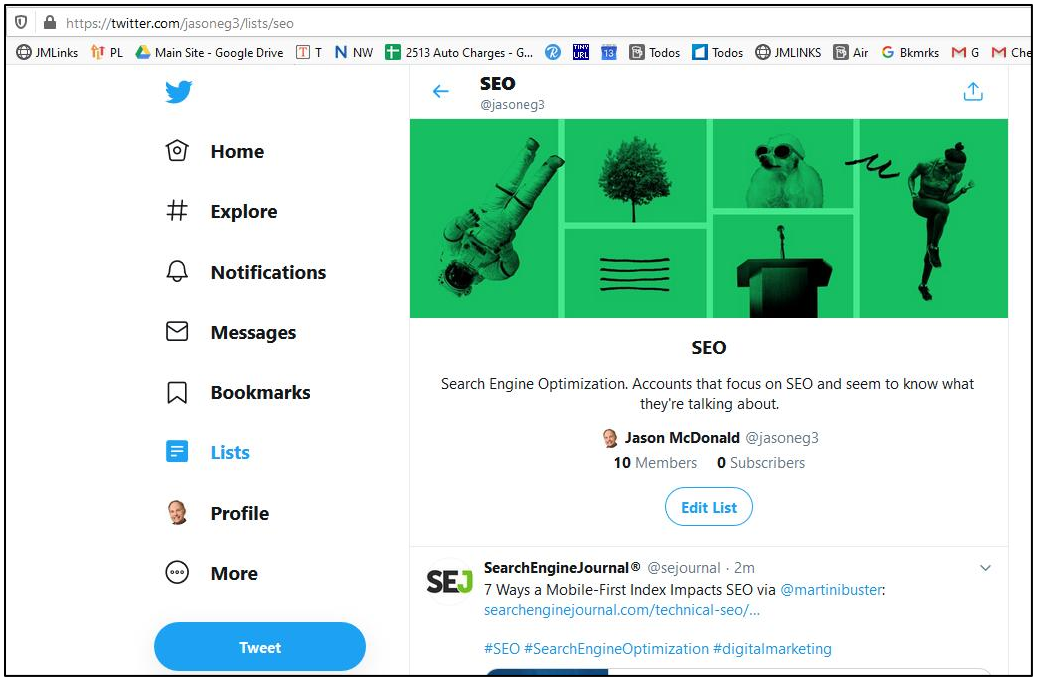
That said, be cognizant of your industry. Suppose you're a scientist working in proteomics. In that case, you want to compare your follower count to other similar scientists, and you want to like, comment, and retweet accounts of others in your industry, none of whom will approach the numbers of a Kardashian. But regardless, in any niche, you can see who is more "popular" than someone else.

Look for "powerful" influencers or superfans in your industry as measured by what they post about and how many followers follow them. *#HighSchoolNeverEnded.*

Content Marketing on X

In terms of content, X functions similarly to Facebook or LinkedIn. When people follow you on X, they see your posts in their news feed (X *timeline*), subject to the clutter of the rapidly-moving X news feed and a secret algorithm in X that attempts to prioritize interactive Tweets (e.g., similar to the Facebook *algorithm*). Similarly, you can share the posts of others (called *retweeting* or *RT*) to your own followers, and others can share your posts to their followers. It's *social* media, after all.

As you're researching X, look for a) accounts of competitors and/or b) accounts of people or brands to emulate. Here's a pro tip. You can create a "list" on X by clicking on the "lists" tab to the left. Then name it by topic, such as "organic" for people in the organic industry, "outdoors" for companies like Cabela's or Bass Pro Shops, or perhaps "competitors" for people that you compete against. You can make your list public or private. Then, when you're logged into X, you can click on your list to filter out all the noise and filter only the accounts you've put into your list. To see an example, check out my list of movers and shakers in the SEO industry at **https://jmlinks.com/53m**. Here's a screenshot:

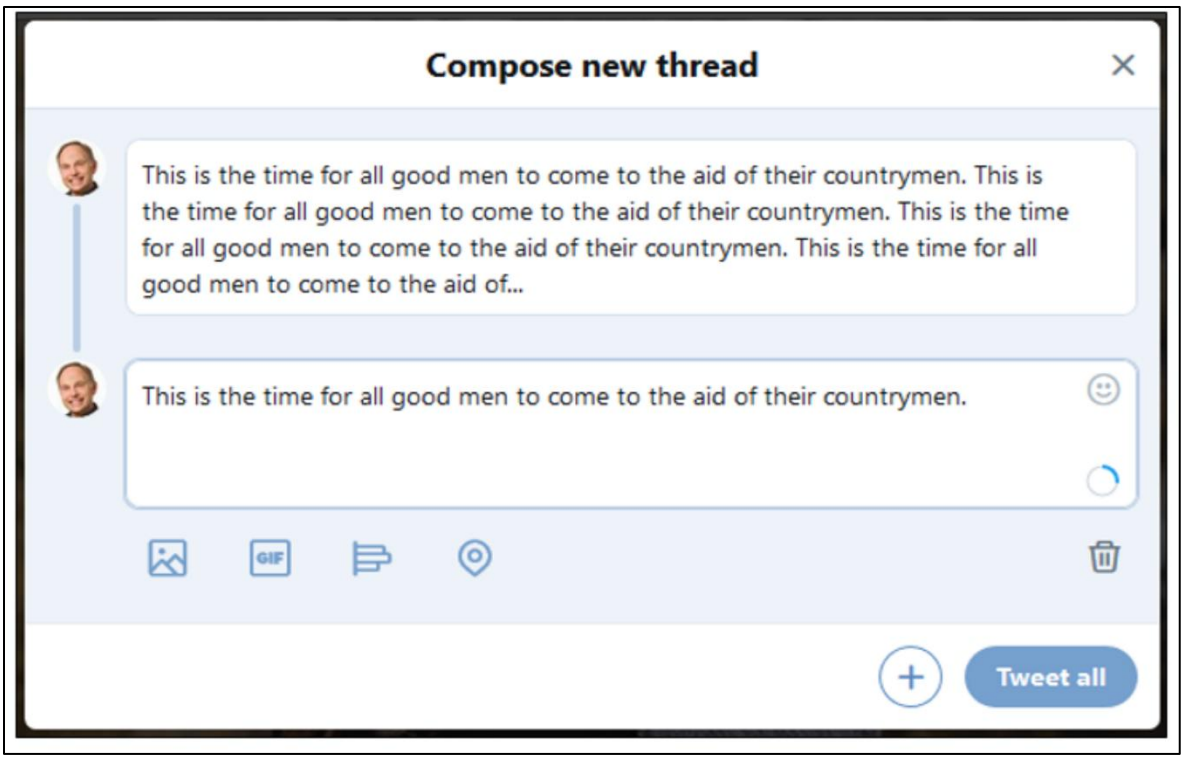


As you develop your accounts-to-follow and content strategy, be sure to leverage AI. You can use X's Grok or ChatGPT. For example, ask ChatGPT to identify the top accounts in your industry (using a specific keyword). Or ask ChatGPT to summarize multiple posts. Or ask ChatGPT to break down your blog post into five separate "teaser" posts that you can post on X.

Understand a Post (Tweet)

Tweets (now renamed *Posts*) are the heart and soul of X and correspond to *posts* on Facebook. A post is limited to (generally) 280 characters, with some confusion as US accounts can use up to 4,000 and paid accounts up to 10,000 characters. However, the culture is "less is more," so I recommend following the 280-character limit. 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. As you compose a post, you can also string together more than one post in a thread. Here's a screenshot:



Think of a post as a news headline or a very short microblog post with just a little supporting information. If you post a link to a blog post or other Web page, use a URL shortener like **http://bitly.com/**, **http://tinyurl.com/**, or the "short link" feature in WordPress so as not to waste characters. X also has a built-in shortener. You can create a self-standing post, or you can post "outlinks" to blog posts, videos, or images. You can post from either your phone, computer, or through a third-party app like Hootsuite.

Most posts these days combine elements. They feature text with a link to an external blog or video, followed by a photo or video. Here's an example:

This post by *@terrywhalin* features a short "headline," a "mention," an outward bit.ly link, and an image.

Notice that if your post references an external URL and that URL has a featured image, X will display the image from the website. For example, here's a screenshot of a post by me to a blog post I wrote about technical tips for Instagram marketing, with the image and headline being pulled from my blog:

Thus, if you don't manually add an image to X, it will pull the image from the blog post or website. As a marketer, this emphasizes the importance of having coherent titles and featured images across all website content.

You can also post a "native" video to X, and then the video itself becomes the image:

And on any post, you can see replies (comments), retweets (shares), and likes at the bottom. For instance, the post above has five comments, 21 retweets, and 29 likes.

The goal is obviously to get your fans to reply, retweet, and like your company's posts!

If you click on a post (click somewhere in the middle of the text), you can view the conversation going on around that post. For example, if you click on the post above, you'll see the comments and conversations surrounding that post. Here's a screenshot:

Note that you're not in control of the conversation! X is open, meaning fans, friends, haters, hecklers, and just plain crazies can chime in on any post.

Remember: it's *social* media, so be aware that anyone, anywhere, can post right back at you – in agreement, in disagreement, good, bad, ugly, or just plain crazy. More than any other social media platform, X conversations can be rather rough and rude (*that's the downside*). More than any other platform, with the possible exceptions of YouTube, TikTok, and Instagram, however, X allows people to discover new content that is not "in" their circle of friends (*that's the upside*).

And each reply can garner more replies, retweets, and likes. X is the 24/7 social conversation going on around everything.

Understand Hashtags

A **hashtag** (**#**) in a post indicates a keyword or theme and is clickable in a post. Think of a hashtag as a keyword/subject/theme about which people are talking: *sports, the Oakland A's, global warming, the 2028 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 determined mainly by whether many or just a few people use it. And, yes, because X 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 **https://ritetag.com/** or search X 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*. Alternatively, you can search for X by keyword and look for the # hashtag symbol. For example, here's a screenshot of a post with hashtags *#natural, #organic, #mommyandme*, and *#gifts*:

You can click on any one of these hashtags to discover more posts and, thus more hashtags. Hashtags, after all, are "conversations" around a topic and are clickable in a post to discover more posts on that topic. To see the "conversation" on X on *#organic,* visit **https://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 X

In the post above, the hashtags *#organic* and *#natural* are "themes" around which people converse on X. By including hashtags in your Tweets, you can be found by non-followers who are interested in and following that topic on X. For example, if you are

a seller of organic baby food and have a new flavor out, you might post 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 post, and for people interested in that topic, your post becomes part of an enormous conversation surrounding that theme. So, finding popular, relevant hashtags and tweeting on them is a good promotion strategy on X. Remember, however, that you have to stand out and get attention amidst all the noise!

> **AI PROMPT.** Explain to ChatGPT the keywords and themes that matter to you. Then prompt it as follows: "Knowing our keyword themes, build me a list of the top five most relevant hashtags on X for our company."

You can also find trending hashtags on the X app. Just click on the magnifying glass, then "trending" and scroll down to look for hashtags. More importantly, however, identify and monitor hashtags relevant to your business, target customers, and industry.

Understand the @ Sign or Handle

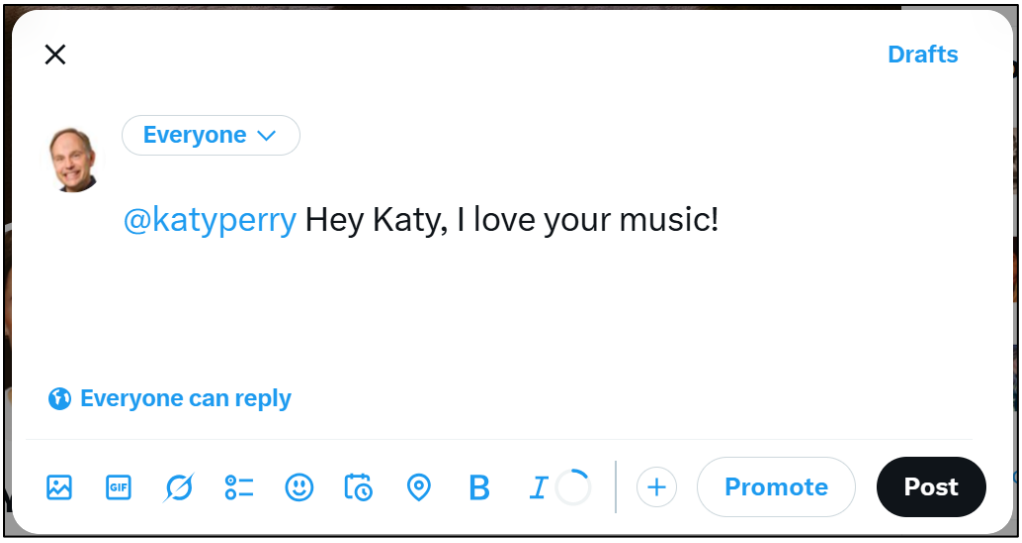
The @ sign designates an X account, often called a "handle" on X. When included in a post, it does two things:

- It becomes **clickable**. Anyone who sees this post can click on the @*handle* and go up to that account to view the account and possibly follow that person on X; and,
- It **appears in that person's news feed and sends an email alert to them** that they have been mentioned. This is called a "mention." A *mention* means that someone has mentioned you (your X account) in a Tweet. Nowadays, people also use the word "tag" to mean including the @*account* in a post to X or post on Instagram, although technically, "tag" is more photo-centric.

Here's a screenshot:

Raw Halo (*@RawHaloUK*) has posted an announcement to its followers about a competition, which includes the *@SoilAssociation*. Anyone seeing this post can click "up" to *@SoilAssociation*'s account, and *@SoilAssociation* will receive a "mention" notification in their account news feed.

In fact, anyone can post to anyone. Just search for the account, and then, on the far left, click the "Tweet" button. For example, if I want to post to *@KatyPerry*, I visit her account and then look for the "Post" button on the right:



When I click on the "Post" link, X then pre-populates my post, as indicated above. It begins with *@katyperry,* which is both a "mention" and a way to post "to" a person or account. Now, here's the deal. X is totally open; you can find anyone on it and post to anyone (except the very weird minority that has made their accounts private). When you include their handle, as in *@katyperry,* in your post, this "mention" triggers an alert to them in their feed. This means that you can post to anyone on X regardless of whether you follow them or they follow you. It's completely open.

USING THE @ SIGN, YOU CAN TWEET TO ANYONE

Unlike Facebook or LinkedIn – you do not need "pre-approval" to converse with someone via X. Again, when your post contains the *@handle* of someone else, that generates an alert in their news feed and often via email. **Via X, you can post to anyone**! (*More on this in a moment*).

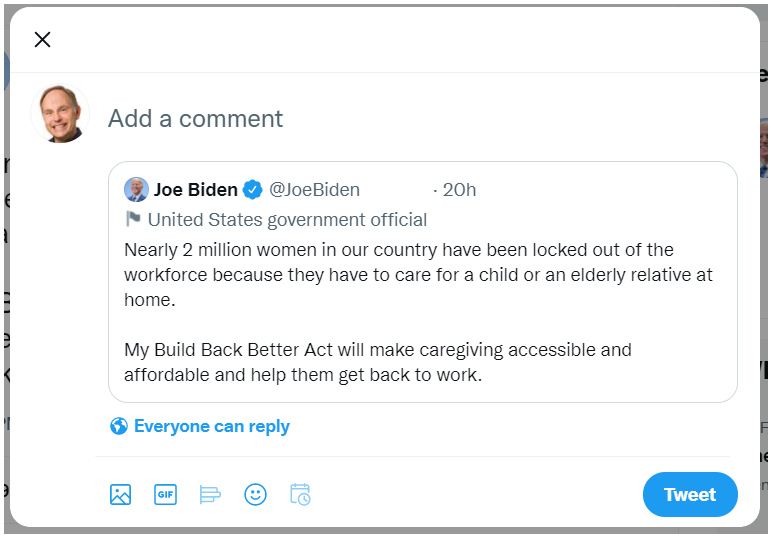
> **VIDEO.** Watch a video tutorial on how to use the "@" sign or "handle" on X for marketing purposes at **https://jmlinks.com/16y**.

Understand Mentions and Retweets

We've already explained a **mention**. When someone includes your *@handle* in their post, that's called a *mention*: a clickable link that allows anyone following them to navigate "up" to your account and learn more about you or your business.

A **retweet** is a special type of mention designated by "*RT*" on X. In it, person *A* retweets the post of person *B*, meaning they share your post with their followers. Imagine if Ellen DeGeneres recapped your joke on her TV show, or imagine if one of your vendor partners tweeted out your product or service announcement to their followers. To retweet a post, find a post that interests you and click on the two arrows at the bottom. You can then add your own message to the RT:

"Retweet" just instantly pushes it out via your account. "Quote post" means you want to add some commentary:



You can **retweet** posts that interest you, and more importantly, your own followers can retweet your posts to their followers, thus expanding your reach. Getting retweets should be a prime objective of your X marketing. A mention or "retweet" of your posts would spur followers of followers to learn about you and might result in a massive

increase in your follower count. Retweets are also shown as "mentions" in the account of the person or brand that initially composed the post.

You can also, of course, **comment** on the posts of others; they get notified that you've commented on their post, and this also tends to show in the newsfeed of people who follow you. Interactivity is essential for content marketing on X, so follow, like, comment, and retweet the accounts of people in your industry, whether they be competitors, industry luminaries, or even customers.

Here's a screenshot of a retweet, designated in X lingo by *RT*:

@Robots_and_Ais is retweeting *@Yale* (Yale University), which tweeted about a data science and neuroscience grant, which includes a "mention" of *@NSF* (the National Science Foundation). In this way, the followers of *@Robots_and_Ais* learn about the post by *@Yale*. This is how information can spread from one account to another on X.

> *You don't have to be a Hollywood star to do this: identify essential people in your industry and converse with them via their X handles (@username). 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).*

Post on X (Privately) To Someone

While you can use the *@sign* to talk with someone and hopefully provoke their interest, remember that this is a public

» INVENTORY OF LIKES & DISLIKES ON X

Now that you understand the basics of how X works, it's time to research whether your customers are on X and identify competitors in your industry who are on X and/or successful businesses on X to make an inventory of your likes and dislikes.

Find Accounts on X

Stay signed into your X account. There are several ways to find accounts to follow on X:

- **Visit their Websites**. Most big brands will have a prominent link to X right on their Website. For example, go to **https://www.cabelas.com/** or **https://www.aspca.org/** and find the X link, click on it, and hit follow. Go to your competitors' websites and do the same.
- **Search on X**. While logged in to your account, go to the top right of the screen, and in the "Search X" box, enter the names of competitors, businesses you like, or keywords. To find stuff on X 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 will now see its posts in your news feed.
- **Advanced Search on X**. You can find X Advanced Search by first doing a search, then clicking on "Search filters" on the left, and then "Advanced Search" at the bottom. Or, just visit **https://jmlinks.com/46k**. You can also use X Pro, which, by creating a column for a theme, gives you more detailed search options.
- **Use AI.** Go to Grok (**https://grok.com/**) or the far left menu of X, and ask: "Identify the top accounts for my industry, proteomics." Input your industry or a keyword and Grok can identify the best accounts to follow.

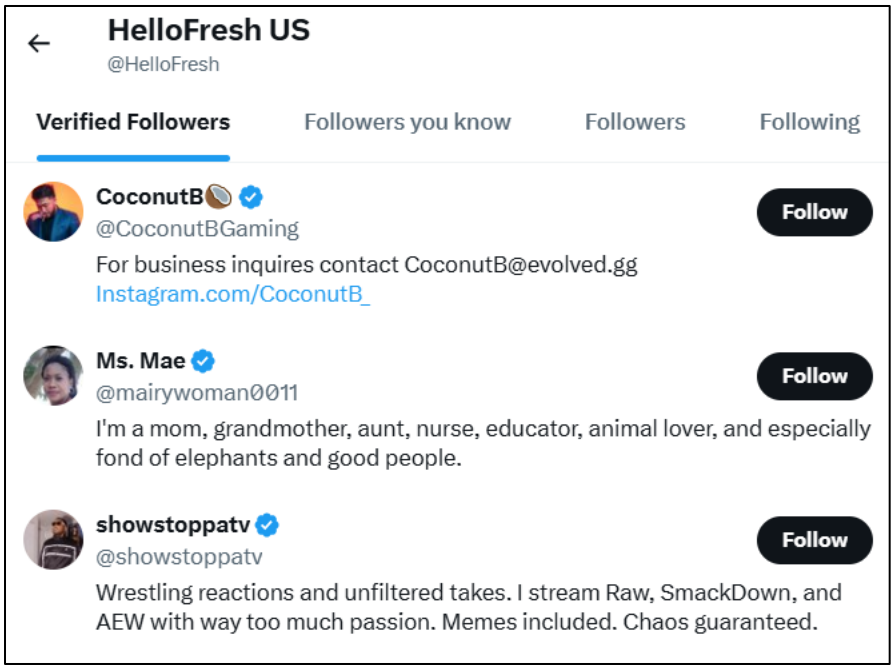
Use Google to Find X Accounts

Outside of X, go to Google and type in *site:x.com* and your keywords. For example, on Google, type in *site:x.com "organic food,"* and Google will identify X accounts that post on that keyword. Google is often a better way to find X *accounts*, whereas X search is a better way to browse individual *posts*. Remember: there is no space between site: and x – it's *site:x.com* not *site: x.com*. An example would be using Google, *site:x.com "organic food"*, to find posts that contain the term "organic food" within them.

Once you follow companies, you can browse their X pages easily by clicking on the "following" link at the top left of the page while you are logged in to your X account. In this way, you can see who they follow. Here's a screenshot –

So, if you click on "following," you can see the accounts and people Gucci follows. If you click on "follower," you can see who follows Gucci. Now, think like a marketer. You can identify competitors, click on folks following them (a.k.a., their customers) and follow them, or even post to them. There are no secrets on X, including the customer lists of your competitors.

For example, I can be an up-and-coming organic grocer in Austin, Texas, and research and identify accounts on X that are competitors, such as HelloFresh (**https://x.com/HelloFresh**). Then, I can click on their followers and reach out to them. Here's a screenshot of the followers of *@HelloFresh*:



I can not only *identify* but also *follow* and *post* to their followers or customers. I can also review their posts to see which ones have the most interaction, participate in those conversations, and even follow or post directly to those people who make comments. Indeed, I can even create X ads that specifically target the followers of my competitors.

You can also easily find influencers on X. Here's how:

- Utilize Google and other tools, such as LinkedIn or ChatGPT, to identify X accounts of key influencers, competitors, journalists, and other relevant individuals.
- Search X for "journalist" or "blogger" and your target keywords. Do the same on X Pro.
- Post "to" these key influencers with a free offer like your latest eBook or a free product sample.
- Look at who they follow (and post to those people).
- Look at who follows them (and post to those people).

Even if you aren't using X to connect with your customers directly, you can use this "post to anyone" strategy in combination with Google and/or LinkedIn to literally communicate with anyone via X! This feature of "Post to anyone" is unique to X and is, in my opinion, the most remarkable feature for marketers.

Returning to company setup issues, your task here is to identify companies on X, both within and outside 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 with all social media, the profile picture is visible when viewed on someone else's timeline. Do you like/dislike the profile pictures of various companies on X? Why or why not?
- **Header Photo**. Similar to the Facebook cover photo, this wide banner dominates the account visuals. How are competitors and other businesses using the header photo on X?

- **Pinned Posts**. Are any brands using the pinned post feature? If so, how?
- **Account Bio**. How are brands using their bio to market via X? Do you see any opportunities or pitfalls here?
- **Following and Followers**. Whom are they following, and who follows them? What does this tell you about their effectiveness on X? Are there opportunities to steal their followers? Why and how?
- **Lists**. Have they created lists? Are they on the lists of others? What does this tell you about bookmarking vis-à-vis this company and/or its themes?

Posting Strategy

You'll quickly realize that X offers little customization and that most of the action on X revolves around posting strategies. What are businesses posting, and why? What is their *posting rhythm*? As with all social media, the idea is to spur interactivity, elicit replies, retweets, and likes, and drive traffic to desired actions, such as website visits or visits to your e-commerce 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 X? If so, what are they tweeting about? What are they interacting with, and why?

Let's review some accounts on X and reverse-engineer their posting strategies. Do the same for businesses that you like and/or competitors in your industry.

X Marketing: Common Uses

Here are common uses for X and example accounts:

- **Celebrities**. Examples are Katy Perry (**https://x.com/katyperry**) , Selena Gomez (**https://x.com/selenagomez**), Luke Bryan (**https://x.com/lukebryan**).
    - **Marketing Goals**: stay top of mind, get social shares, use X 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://x.com/HillaryClinton**), JD Vance (**https://x.com/JDVance**).

    - **Marketing Goals**: stay top of mind, get social shares, use X 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://x.com/greenpeace**), Red Cross (**https://x.com/redcross**), Catholic Charities (**https://x.com/ccharitiesusa**).
    - **Marketing Goals:** stay top of mind, get social shares, use X followers to take political action or make donations. Posting rhythm is similar to politicians.
- **Brands.** Examples are Walmart (**https://x.com/walmart**), Gucci (**https://x.com/gucci**), Home & Gardens (**https://x.com/homesandgardens**).
    - **Marketing Goals:** stay top of mind, get social shares, use X followers to connect to buy actions, also use X 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://x.com/kogibbq**), Chipotle (**https://x.com/ChipotleTweets**), Wendys (**https://x.com/wendys**).
    - **Marketing Goals**. stay top of mind, get social shares, use X 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 X are:

- **Stay top of mind / one touch to many**. To the extent that your users are on X (usually to follow up-to-the-minute news), you can use X to continually remind users about your company, product, and/or service.
- **Insider/loyalty programs**. Suppose you are a brand with a core group of loyal customers (e.g., Bass Pro Shop's loyal group of outdoor fanatics or Gucci's loyal group of fashion addicts). In that case, you can use X to stay in touch with this

elite group and reward them with insider information, tips, special deals, and even coupons.

- **Coupons / bargains / challenges / contests**. If you use coupons or discounts, especially in retail, customers commonly scan X for coupons and special deals. Contests and challenges are big on other platforms (Instagram, TikTok), but you might also try them on X.
- **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 X to identify special deals, coupons, and what's cookin'.
- **Discussions on Timely Topics**. By using hashtags (e.g., #AIDS, #globalwarming, #O*bamacare, #yourindustrynews*), you can participate in an ongoing global discussion and thereby market your products. A special case of this is trade shows, which often use a hashtag (*#CES2026*, for example, for the Consumer Electronics Show) to allow participants to converse via social media platforms like X.
- **Branded Conversations**. People who "love" a brand often discuss it in detail on X, especially via a *branded hashtag*. An example would be *#Gucci* for the fashion brand or *#Wendys* for the fast-food brand. You can either listen in on conversations about competitor brands and/or create your own.
- **News Alerts**. To the extent that you generate and/or participate in news, X is the go-to service for breaking news (especially via hashtags and trending searches). Perhaps your best use of X is as a "research tool" on your industry and competitors, not as a "posting platform."
- **Political Action**. For nonprofits and political groups, X is the go-to platform for organizing politically and discussing issues. If you or your organization is involved in politics, you need to be on X!

IDENTIFY COMPANIES THAT DO X WELL AND REVERSE ENGINEER THEM

For your next **TO-DO**, download the **X Research Worksheet**. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to

register your workbook), and click on the link to the "X Research Worksheet." You'll answer questions as to whether your potential customers are on X, identify brands to follow, and inventory what you like and dislike about their X setup and marketing strategy.

» CREATE X-FRIENDLY CONTENT

Content is king on X, just as it is on all social media. We've already covered the basics, but let's review them:

- Each post is limited to **280 characters**, though you can string posts together.
- **Hashtags**, designated by the # symbol, such as #*organic* or #*organicfood*, designate conversational themes and are clickable in posts.
- The **"@" sign** designates a handle and is clickable in a post; even when you are not following or followed by a person, using their handle (for example, *@jasoneg3*) is a "mention" and generates an alert to that person.
- **Followers** can view, like, comment on, and share or retweet content on X.

No one is in control of anything on X, and the pace is swift. In terms of content, you can:

- Tweet just **text**.
- Tweet **text** with **@ signs and #hashtags** to reach out to persons and/or conversational themes.
- Tweet text and **images/photos**.
- Tweet **links** to external websites like blogs.
- Tweet **short-form video** that is "native" on X.

In terms of actual content, you want to post things that are of interest to your customers. If you're a brand, you want to post news announcements, new products or services, links to new blog posts or YouTube videos, etc. You also want to post and comment on industry news.

TWEET INTERESTING STUFF #DUH #DONTBEBORING

Take a look at big brand accounts like Bass Pro Shops (*@BassProShops*) and "reverse engineer" their content strategy. You'll see: a) posts about the outdoors, b) posts with links to their blogs and YouTube videos, c) contests or challenges, d) special deals or coupons, as well as "insider" alerts on new products, e) new product alerts, and f) surveys. Compare that with an author or public figure like the author @DineshDSouza, who posts numerous social commentaries as well as promotional posts for his conservative books and documentaries. Or take a look at *@kogibbq*, the Korean / Mexican fusion barbecue chain in Los Angeles. They post 80% the location of their trucks in LA, and 20% is fun photos, what's cooking, and some interaction with their fans.

> **AI PROMPT.** Ask ChatGPT to take content you already have, such as blog posts or video transcripts, and then summarize it into a series of "teaser" posts for X.

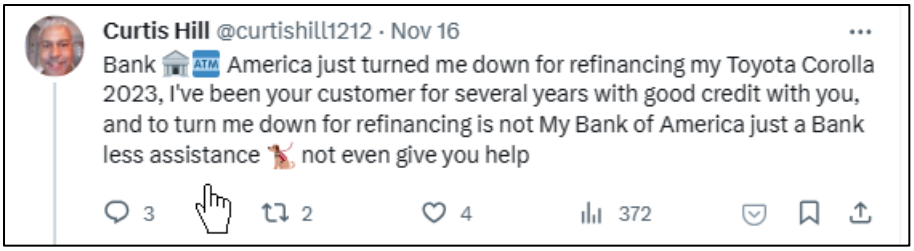
You'll see that successful brands on X fill a content marketing pipeline with posts that are relevant to their brand and alternate on a continuum between commentary on industry events or news, up to in-your-face, "buy my stuff" content. As with all social media content, it should be 80% or more, *fun, fun, fun, fun, fun, fun, and 20% or less. Buy my stuff, buy my stuff, buy my stuff*.

X Content is What You Make of It

X content, in short, is what you make of it. It's the kind of content that is engaging to your fans and can be as simple as a coupon code, as complex as a link to a blog post on climate change, or as silly as your response to #*mondaymadness*.

Do not miss the importance of **interactive** content on X. X is a *conversational* platform. For example, here's a screenshot of some of the conversation around Bank of America:

And comments:



What is the brand's reaction? Sometimes, it's as if the brand, public persona, or other person is conspicuous by their absence in interactive content on X. That's a mistake.

> **AI PROMPT.** Utilize ChatGPT to craft concise responses to conversations within your industry. Be sure to prompt it to stay on "brand voice," but you can use ChatGPT to speed up your interactive content strategy.

Interacting with your fans and others is a key content opportunity on X. So, join in the conversation as a brand! Be prepared to be heckled when you post. It's part of the "fun" of X.

Your to-dos with respect to X content are to identify:

- **hashtags** or topics that you want your brand's message to be part of the conversation;
- **text, images, photo**s, and even **videos** that you can post natively to X on these themes;
- **external links** to your blog or website with summaries posted to X;
- **interactive conversations** between your brand and customers that are relevant and positive for your brand; and,
- an awareness of and readiness for **pushback** from customers and hecklers, as no one is in control of X.

Always look at the problem from the perspective of your target customers. Why will they want to follow you on X? What will they get out of your content? What's in it for them? Is it as simple as a coupon or a special deal? Is it participation in an insider or superfan event? Is it a sense of belonging to a "cool club?" Is it a conversation with you and others on X about the news of the day?

The *why* is as important as the *what* when it comes to an X content marketing plan.

Think Before You Tweet

On a cautionary note, make your team aware that X (and the Internet) is like an elephant. *It never forgets*. Because X is so immediate, people often shoot off their mouths or posts to X without thinking, behaving worse than they do on any other social media platform. As the Russians say:

"A word is not a bird; once it flies out, you can't get it back."

If you don't have something nice to say (even on X), it's probably better not to say it at all. Stay positive, and stay classy. If you're a big brand, consider implementing a policy that requires more than one person to review and approve each post before it's published. It's easy to click and post, and it's very, very hard to call back a post you wish you hadn't sent in the first place.

Just ask the TV star Roseanne (*@therealroseanne*), whose racist post ended up getting her TV show canceled in May 2018 after a firestorm of social media outrage. One has to wonder where her sanity was and where her marketing team was *before* she tweeted. If you have a hot-blooded CEO or executive, ask yourself this question *before* an inappropriate post causes a social media train wreck for your brand. It's a truism that day in and day out, celebrities and brands have to "apologize" for their latest stupid post. Pro tip: **think before you post!**

» TWEET TO JOURNALISTS, BLOGGERS, AND INFLUENCERS

One of the uniquely valuable uses of X is a "deep dive" into using this ability to post to anyone. Using X's openness, you can identify journalists, bloggers, or other influencers in your industry and post to them. They don't have to pre-approve or "like" you. X is 110% open.

In fact, because X is where news breaks first, it is probably the favorite social media channel of journalists. Thus, since journalists and bloggers actively monitor X for news, they are "hungry" for you to "pitch" them story ideas.

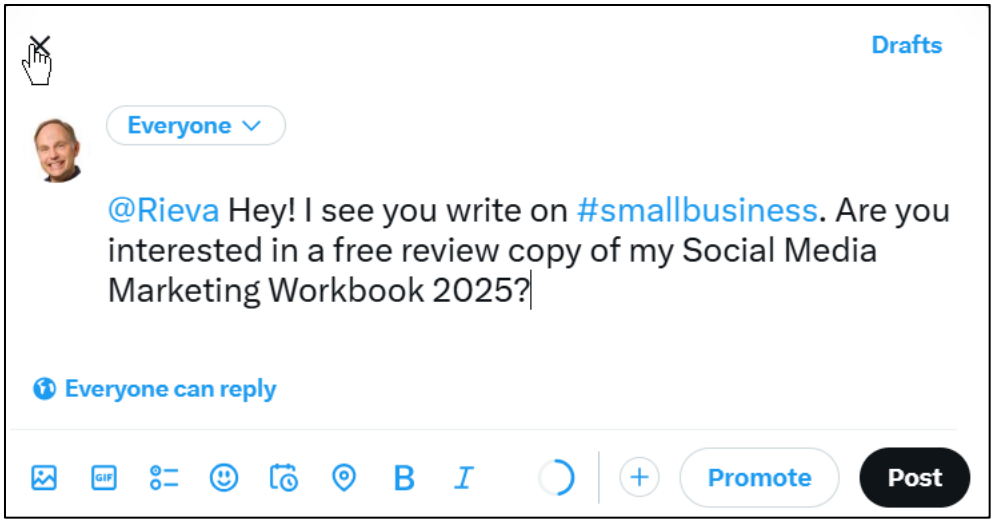
Journalists and bloggers love X, so post your news directly @ them.

Let's say, for example, that I want to send a free review copy of my *Social Media Marketing Workbook* to journalists, podcasters, and bloggers who write about small businesses. First, I'd go to X and identify journalists, podcasters, and bloggers through X, ChatGPT, and Google searches (*site:x.com*) for keywords such as "small business journalist" or "small business blogger." Then, I'd go to each X 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?

For instance, here's the account of small business journalist Rieva Lesonsky:

And here's my post to her about my 2025 edition:



In this way, you can use X to send "unsolicited posts" to journalists and bloggers without annoying your own followers. It's not unlike the way you use LinkedIn to reach out to first- and second-level contacts. This is yet another example of "carrot" and "outreach" content marketing, this time utilizing X to reach journalists, bloggers, and podcasters.

Indeed, you can even use LinkedIn in combination with X. First, search LinkedIn by keywords, click on *People*, and then browse any level (1st, 2nd, or 3rd), click into a person in the search results, and then click on *See contact info* to find their X account (if they inputted it to LinkedIn).

Here are the steps:

1. Research journalists, bloggers, and other influencers in your industry via X and LinkedIn.
2. Have a "carrot" ready, such as a free eBook, a webinar, or a wine-and-cheese event at an industry trade show.
3. Tweet to them a solicitation essentially saying, "*@journalist* Hey, I see that you are a journalist/blogger/influencer interested in {*keyword*} and I have this {*carrot*}. Are you interested?"

As is always true on social media, however, don't be spammy. Have a legitimate and interesting reason for reaching out to them, and be respectful. If they do not show interest, move on to the next target.

» BRAINSTORM AND EXECUTE A TWEETING STRATEGY

Optimizing your account on X 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 to-dos. Next, the real work begins. *What will you post? Who will care?* Let's reverse-engineer some companies and their **tweeting strategies**:

> **Kogi BBQ** (**https://x.com/kogibbq**). Their tweeting strategy is 90% about the location of the taco truck, with a few posts 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.
>
> **Bass Pro Shops** (**https://x.com/BassProShops**). Their posts are largely off-loads to blog posts, YouTube videos, and Instagram photos about the fun of outdoor activities, some participatory contests for hard-core Bass Pro Shop fans, headline links to in-depth blog posts on outdoor fun, and about 10% shameless "buy our stuff, isn't this a cool product" posts. Like many retailers, Bass Pro Shop uses X as a place to communicate deals, insider information, and special offers to its most devoted customers.
>
> **Woot** (**https://x.com/woot**). Their posts are 100% about discounts and bargains, as Woot (now owned by Amazon) is primarily focused on offering discounts and special deals. It's the home shopping network gone X.
>
> **Greenpeace** (**https://x.com/greenpeace**). This non-profit organization posts photos that inspire appreciation for wildlife and nature, links to blog posts about environmental issues, and encourages calls to action on political matters.
>
> **Cato Institute** (**https://x.com/catoinstitute**). This political action organization posts about politics from a conservative perspective, with offlinks to its blog and videos, plus the occasional call to action.

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 on the top of the 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 ultimately lead to a sale or business action? Summing up, X is used most commonly to:

- stay top of mind, pestering and reminding customers to "look at me, look at me!";

- communicate with influencers, superfans, and fans, i.e., people who are passionate (or potentially passionate) about your brand;
- leverage #*hashtags* to reach a wider audience and participate in society-wide discussions; and/or
- reach out to journalists, bloggers, and other influencers.

For your next **TO-DO**, download the **X Tweeting Strategy Worksheet**. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), and click on the link to the "X Tweeting Strategy Worksheet." You'll answer questions to help you understand what other companies are doing on X and begin to outline your own tweeting strategy.

Content is King

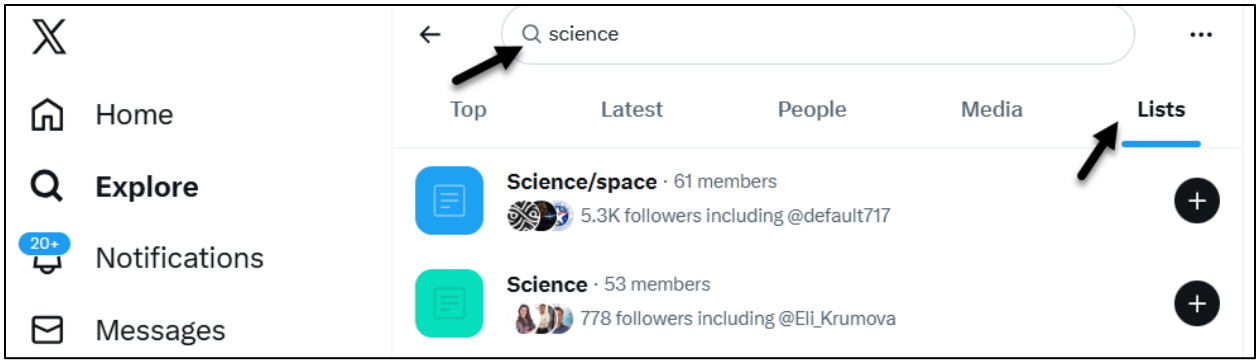
As you work on a tweeting strategy, you'll quickly realize you need a lot of content! Remember to create a **content marketing system** of:

- **Your own content**. X is all about off-loads to blog posts, infographics, images, photos, videos, Memes, and other types of your own content. X and blogging go together like peas and carrots, while X and video go together like scotch and soda.
- **Other people's content**. Relevant content in your industry. By curating out the garbage and identifying the cool, fun, and interesting stuff, you can use other people's content to help your posts stay top of mind.
- **UGC Content.** Use hashtags like #*contest* or #*challenge*, or create a branded hashtag (if a significant portion of your customer base is on X). Motivate your superfans and followers to share their own content around your branded themes.
- **Interactive content**. X is perhaps the most **interactive** social media platform. "Like" the posts of others. "Comment" on others' posts. "Retweet" them to your followers with comments. @*mention* people constantly. "Tweet to" famous people, superfans, and influencers, even if you don't know them. By interacting with the content of others, you can open the door to "real" relationships.

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**). X Pro (**https://pro.x.com/**) is also a good way to stay in touch with the movers, shakers, and frequent tweeters in your industry.

You can also create or identify X lists by topic, thereby pre-organizing whom you follow into easy-to-access, content-specific lists. Organize your content into topic groups, and then as you find valuable content for your target audience, "post out" that content. Also, monitor key *#hashtags* in your industry and chime in with relevant posts (and retweets) on topics that are trending.

Here's a screenshot of a search for "lists" on X that relate to "science."



As for your own content, X 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, and YouTube videos. X is a headline service pointing to the "rest of the story" on your blog, video, or infographic.

» PROMOTE YOUR X ACCOUNT AND TWEETS

Once you've set up your X account and begun to populate it with posts regularly, you've essentially "set up" your party on X. Now it's time to send out the invitations.

> **In and of itself, an X Page will not be self-promoting! You've got to promote it!**

Assuming your X account shares lots of yummy, useful, fun, provocative content that, when seen by a user, will entice them to "follow" you on X, here are some common ways to promote your X 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 X? *Why? Because they'll receive insider tips, fun DIY posts, and announcements about upcoming museum and museum store events, among other benefits*. Encourage your staff to promote X during critical face-to-face interactions. If you're a barbecue truck in Los Angeles, post signs to "follow us on X" on the trucks and have staff cajole customers to "follow you." *Why follow you on X? To learn where the taco truck is, to get special deals, and to learn what's cooking.* Use the real world to promote your X account, and be ready to explain "why" they should follow you on X. What's in it for them?

- **Cross-Promotion**. Link your website to your X Page, your blog posts to your X Page, your YouTube to your X Page, etc. Notice how big brands like REI do this: one digital property promotes another.

- **Email**. Email your customer list and ask them to follow you on X. Again, be sure to explain what's in it for them.

- **X Internal**. Interact with other accounts via the @ sign, share their content, comment on relevant topics using hashtags, and reach out to complementary accounts to collaborate on co-promotion. (See below).

- **Use X Plugins**. X has numerous plugins that allow you to "embed" your X Page on your website, thereby nurturing cross-promotion. To learn more about plugins, visit **https://publish.x.com/**. Among the better ones –

    - **The Tweet Button**. Make it easy for people to repost your content (e.g., blog posts).

    - **The Follow Button**. Make it easy for Web visitors to follow you on X.

- **Leverage your Fans**. People who like your X 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 AN X PROMOTION STRATEGY

Three Special Ways to Promote via X.

X has three unique ways to promote yourself or your company that are significantly stronger than on other social media platforms.

Use #Hashtags to Promote Your Company

The first is the **hashtag**. Because X is all about news, the use of hashtags on trending or controversial topics is bigger on X than on any other social media. Identify trending or important hashtags and include them in your posts. Use **https://ritetag.com/** 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 posts, and make sure that your posts 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.

Industry Trade Shows and Hashtags

Here's a hashtag opportunity you don't 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 *#CES2026* for the 2026 Consumer Electronics Show. Obviously, this show occurs every year, and the 2027 hashtag *(#CES2027*) is relatively easy to guess in advance. My prediction? There will also be a 2028 hashtag, and so on.

Thus, **pre-identify** the hashtags of your own industry trade show(s) as well as subordinate, session, or topic hashtags, and start tweeting on those themes 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 Usage of X 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 X for marketing:

Hey, #CES2026 attendees! Come by our booth at 2:30 pm for a free laser wand give-away.

Identify the X account of the industry trade show(s), and they'll easily show you the relevant hashtags. Ensure you have a robust X account set up before the big show, and then, during the show, start tweeting using show-related hashtags. For many businesses, this "trade show" use of X is the most valuable marketing use of X.

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 posts during show time. In this way, you can post "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 X who are influencers and who have more and/or different fan bases than you.

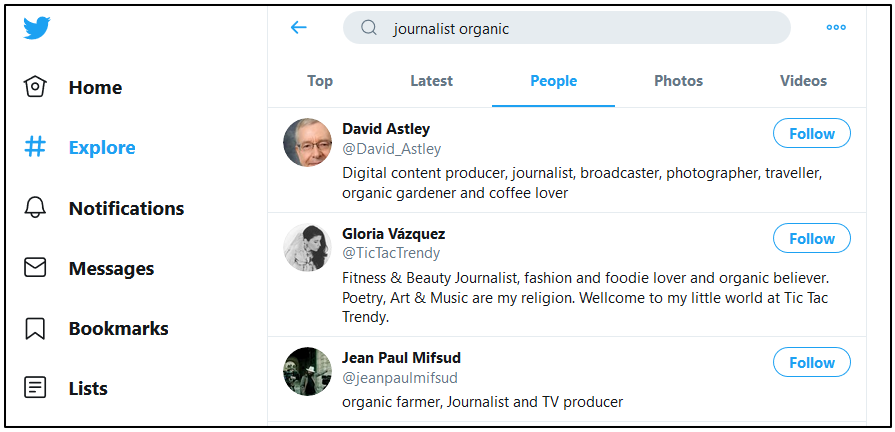
Search for your keywords and identify influencers tweeting about those topics. Identifying them is the easy part. The hard part is getting them to engage in an X conversation with you. You have to convince them to have a conversation with you on X, and then once you're talking to their fans... persuade their fans to follow you, too. You can also use X Pro's advanced search to filter for engagement and accounts that have a sufficient number of followers.

Pitch Journalists via X

We've discussed this already, but you want to think of journalists and bloggers on X as a promotion strategy:

@journalists. Identify journalists on X, find their handles, and post "to" the journalists, pitching them story ideas. Journalists love X because it's where stories break first. They listen to their X feeds as businesses, organizations, and individuals "pitch" them story ideas via X.

Indeed, you can even advertise to select lists of journalists by using username targeting on X. One simple trick is to just search X for the word "journalist" plus a keyword like "organic" and then click on "people." Here's a screenshot:



In this way, you can quickly build a targeted list of journalists who cover the organic industry. Follow them, post to them, and pitch them on your content. Isn't X amazing?

Get Retweeted

The third X 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 posts, thereby (again) allowing their followers to see you and, hopefully, begin to follow you as well. To research what is retweeted in your industry, do an X search with the letters "*RT*" in front of your keywords. For example, visit **https://jmlinks.com/21** to see a search on X of retweets of *#organic* as in "RT organic" searched via X search.

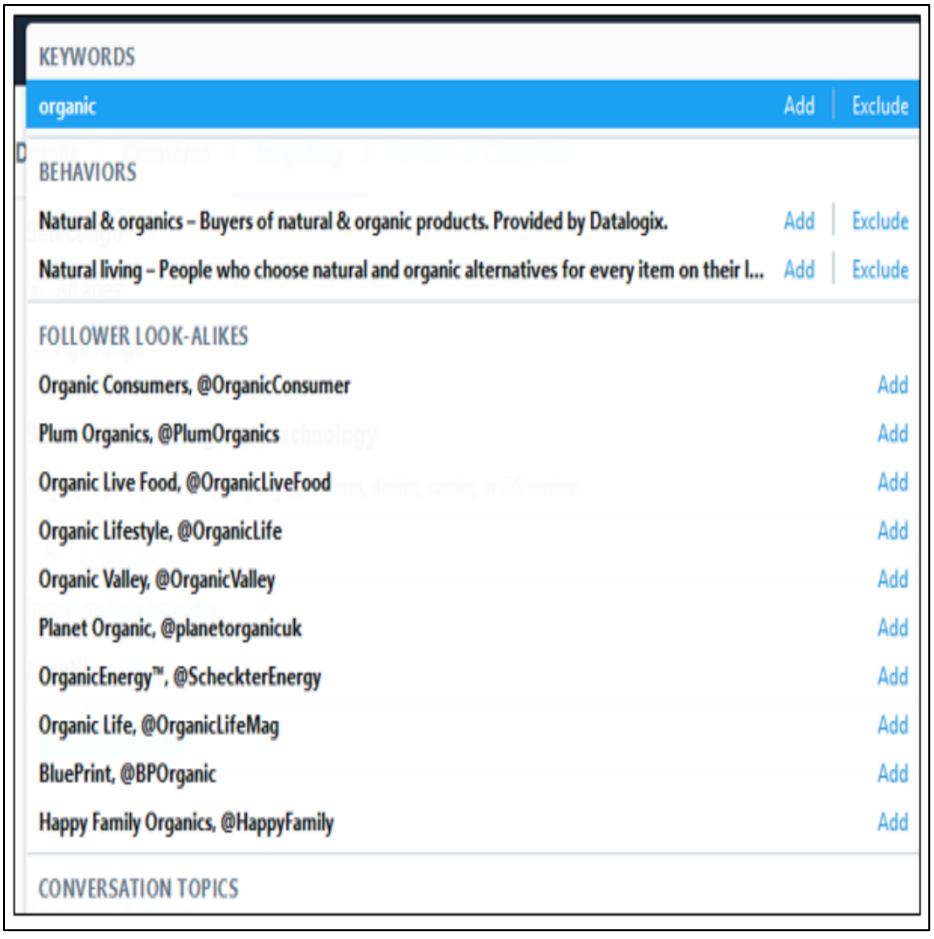
Here's a sample RT:

» ADVERTISE ON X

Besides these organic promotion methods, there's paid advertising on X. You can promote your posts as well as create custom advertising campaigns to promote your account and/or clicks to your website. To begin advertising, log in to your account and click on your profile at the left. Then click on *More* > *Professional Tools* > *Ads*. This will take you to **https://ads.x.com/**.

This gets you to the dashboard. You can then set up *Campaigns* > *Ad Groups* > *Ads* and target them to audiences. Click on *Tools* > *Audiences* to see X's targeting options.

As you create a Campaign, you'll be prompted either to promote your account or an individual post. You can then choose demographic targeting. Here's a screenshot showing people who show interest in "organic:"



Note that you can target the followers of any account, meaning you can target people who follow your competitor, or people who follow an industry trade show, etc.

To learn more about advertising on X, visit **https://business.x.com/**. Because journalists and bloggers often follow X intensely for breaking news, one of the most innovative strategies is to create an "influencer list" of X influencers and then advertise your posts directly to those high-impact users. To learn more about username and follower targeting on X, visit **https://jmlinks.com/74h**.

X Premium: Become Verified

Elon Musk seems to be focused on monetizing X beyond ads. One of his innovations, as of this writing, is "X Premium." The idea is to allow people to purchase a verified X account for around $8 / month, remove many ads, have their posts be prioritized by the algorithm, and be a "higher class" of X users. "X Premium" has three tiers: Basic, Premium, and Premium+. Read about them at **https://jmlinks.com/74j**. Stay tuned as Mr. Musk is clearly trying to monetize X and get it to actually "make money" rather than merely "make controversy."

» MEASURE YOUR RESULTS

Measuring the success or failure of your X 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 X:

- **Sales or Sales Leads**. Have posts or X marketing resulted in actual sales leaders (completed feedback forms for a free offer, consultation, eBook, download, etc.) and/or eCommerce sales?
- **Branding / Awareness**. Has X increased our brand awareness and/or improved our brand image?
- **Top of Mind / One Touch to Many**. Has X helped us to stay "top of mind" by reminding potential customers of our company, products, and/or services?
- **Post Interactivity**. Have people read our posts? Have they interacted with our posts by favoriting or retweeting them?
- **X 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: record your X follower count each month and keep a record of it month by month. I generally do this on my *Keyword Worksheet*, where I also track inbound links to my website and my review count on review platforms such as Google, Facebook, and Yelp.

Analytics Inside of X

Analytics are now limited to professional accounts. If you have a paid or professional account, click *premium* > *quick access* > *analytics*, or visit **https://jmlinks.com/74k**. There you'll see analytics about your account engagement.

There, you can see which posts gained the most impressions, as well as engagements by posts such as clicks, follows, and retweets. X will also tell you whether the links you are sharing are getting clicked on, and so forth. X also has a feature called **X cards** that bridges your website to/from X activity. If you enable X cards on your Website, you get attribution for your Web content plus more data on that inside of X. Learn more at **https://jmlinks.com/31u**.

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

»» CHECKLIST: X ACTION ITEMS

Test your knowledge of X! Take the *X marketing quiz* at **https://jmlinks.com/qztw**. Next, here are your X **Action Items**:

- ❑ **Research** whether your customers (and competitors) are on X. What are they doing? What interests them? Why? Consider whether, with all the controversy surrounding Elon Musk, X remains relevant (or not) for your brand.
    - ❑ Identify a few **customer profiles** that match your *buyer personas* and determine how active they are.
    - ❑ Identify **competitors** and **companies-to-emulate** who are doing a good job on X.
- ❑ Set up an **X account** (learn the basics like #hashtags, @mentions, and retweets) and begin posting useful content following the 280-character limit and X lingo. Consider an X Premium account and/or using X Pro for more powerful functionality.

- ❑ Brainstorm an **X content marketing strategy** of your own content, the content of others, UGC content, and interactive content on industry trends and topics. You need a lot of content to succeed at X!
- ❑ Strategize how to **promote** your X account and posts, including **advertising,** to promote content and grow your followers.

❑ Identify, join, and participate in **relevant #hashtags** on X used by your target customers; do not spam!

❑ Identify **key influencers** (e.g., journalists or bloggers) and note their *@handles*. Where appropriate, post to these key influencers when you have exciting content or free offers, such as eBooks, key news, or new product samples.

❑ **Measure** your **KPIs** on X, such as the follower growth, likes, comments, and retweets of your posts, as well as traffic from X to your website or eCommerce site.

Check out the **free tools**! Go to my *Social Media Marketing Dashboard* > *X* for my favorite free tools on X. Visit **https://jmlinks.com/smmdash**.

»» DELIVERABLE: AN X MARKETING PLAN

Now that we've come to the end of our Chapter on X, your **DELIVERABLE** has arrived. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), and click on the link to the "X Marketing Plan." By completing this plan, you and your team will establish a clear vision of what you want to achieve through X.

8
INSTAGRAM

Instagram boasts over two billion users worldwide, with millions of photos and videos shared daily on the platform. In the minds of many social media experts (and teenage girls), Instagram is more important than its parent, Facebook. Younger people certainly perceive it as much cooler than "Grandpa Facebook" or crazy "Meta." (Many do not even know that their beloved Instagram is a subsidiary.) With "stories" and "reels," Instagram is clearly more innovative than its parent company, Facebook. The question is: "Is Instagram for you?"

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 take a look behind the scenes to "reverse engineer" companies that excel on Instagram. By the 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!

TO-DO LIST:

- Explore Concepts and Brands on Instagram
- Reverse Engineer Instagram Strategies
- Set up Your Business Page on Instagram
- Learn Technical Tips to Using Instagram
- Master Instagram Shopping
- Video: Instagram Stories, Videos, and Reels
- Inventory Likes and Dislikes on Instagram
- Brainstorm and Plan an Instagram Marketing Strategy
- Promote Your Instagram Account and Posts

» Work with Instagram Influencers

» Measure Your Instagram KPIs

»» Checklist: Instagram Action Items

»» Deliverable: an Instagram Marketing Plan

» Explore Concepts and Brands on Instagram

Instagram is phone-first. 99.9% of your users will use Instagram on a phone or tablet, and I doubt that many people even know you can access Instagram on a desktop computer (although it is possible). For personal use, it's best to use Instagram on your phone. As a marketer, I recommend doing so as well, so that you experience Instagram as it's meant to be experienced - i.e., how most of your users will experience your content on the platform.

It's probably easier for purposes of marketing research, however, to use Instagram on the desktop. Once you have installed it on your phone with a username and password, visit **https://www.instagram.com/** and log in to your account. You (and your team) can now browse, research, and "reverse engineer" competitors and other brands from your big-screen desktop. For the sake of clarity, I recommend starting by visiting and following a youth-oriented consumer brand, such as Chipotle (**https://www.instagram.com/chipotle/**) or Wendy's (**https://www.instagram.com/wendys/**). Both are Instagram superstars. Let's walk through their Instagram accounts step-by-step. Our goal? To get the hang of looking behind the scenes at what Chipotle, Wendy's, and other consumer-facing brands are up to on Instagram.

Despite how "fun" Chipotle and Wendy's make Instagram seem, remember that social media marketing is not just about throwing a fantastic party. It's about throwing **a party with a purpose**, namely, to grow your brand and, ultimately, to sell more stuff (or more burritos and burgers).

The Elements of an Instagram Profile

Starting with Chipotle's and Wendy's business profiles on Instagram, let's review the basic elements:

> **Profile Picture.** This is the big smiling red icon that represents the brand. Notice how Wendy's is a smile and not a frown because it 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, similar to 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) on their account. Square boxes represent these. Note that in the top right corner of any Instagram post, 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 requires photo or video content; you can't post text only.

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 being followed. As of September 2025, Chipotle had 796 posts, 1.5 million followers, and is following 319; Wendy's had 522 posts, 1.3 million followers, and is following 319. Just as on X, this is public knowledge; anyone can see who follows whom and even follow the followers of a competitor, interacting 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 direct customers from Instagram to your website, e-commerce store, or another platform where they can take an action, such as making a purchase.

Story Highlights. Just below the bio, "Story Highlights" may appear. Check out another savvy consumer brand, RusticCuff (**https://www.instagram.com/rusticcuff/**), which often uses highlights, just like REI (**https://www.instagram.com/rei/**). These are selections from their Stories, often, though not always, in video format.

Shopping. Shopping is huge on Instagram. (We'll discuss it in a special subsection below). You can only shop on the app, so choose a big brand like REI (*@rei*) or Rustic Cuff *(@rusticcuff*), and you'll see the "shop" option on the app. Click in, and you can browse products and buy them.

Video. Click on the right-facing arrow, and you'll see the brand's videos and/or reels. All videos posted to Instagram are considered "reels." Check out how Chipotle is using it at **https://www.instagram.com/chipotle/reels/**. Reels are discoverable both in the feeds of people who follow a brand and in the feeds of people who do not follow the brand but share similar interests.

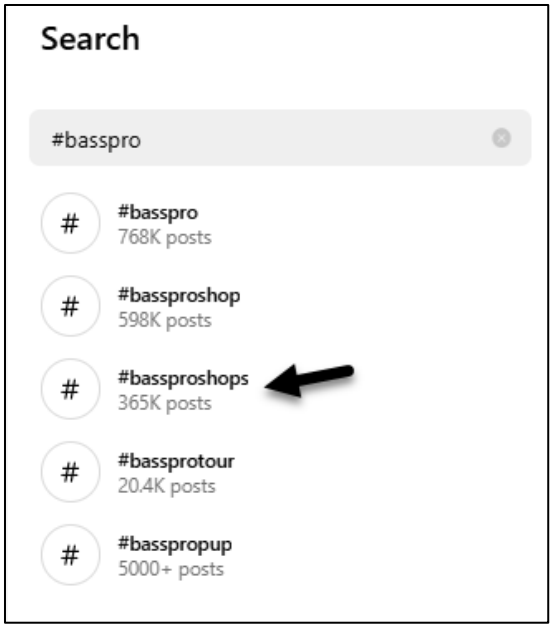
Person Icon. Click here, and you can see how a brand has been "tagged" by others.

Branded Hashtags

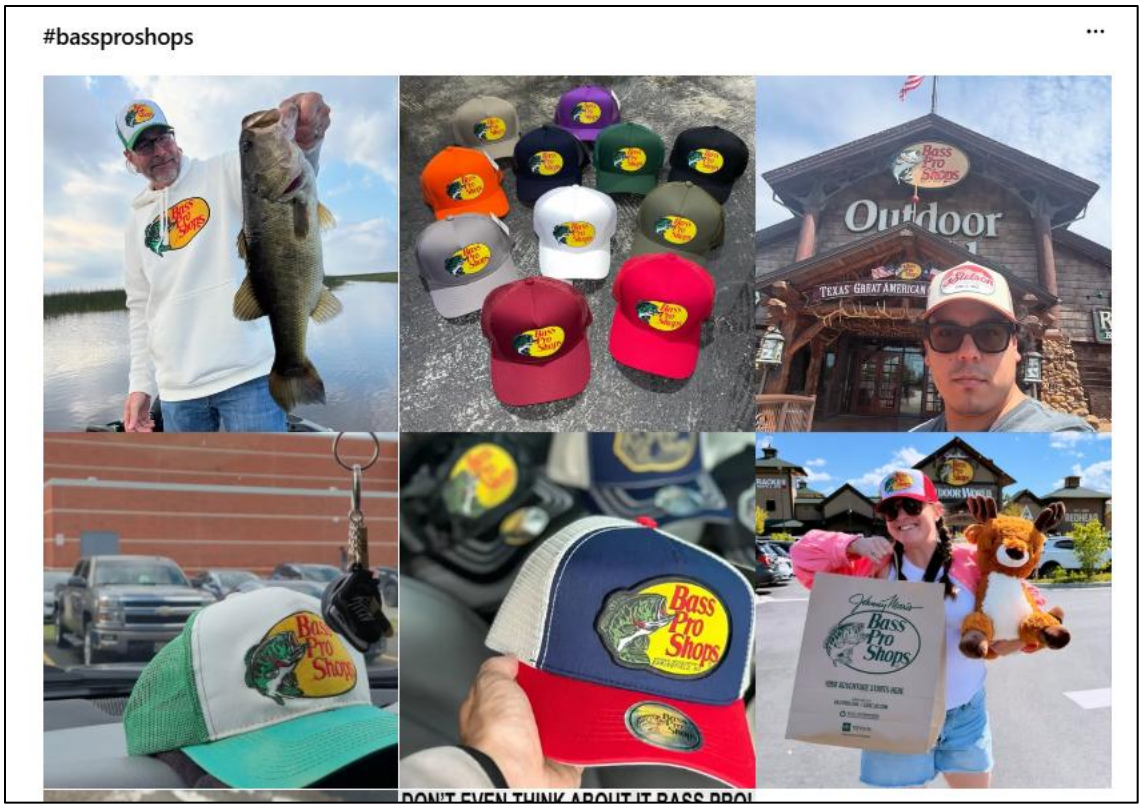
Encouraging UGC is a top priority on a consumer platform like Instagram. Thus, brands often create and promote "branded hashtags" so users can share content about the brand. For example, Bass Pro Shops (*@basspropshops*) promotes *#basspropshops* and encourages users to "tag your outdoor photos" with it.

Here's a screenshot:

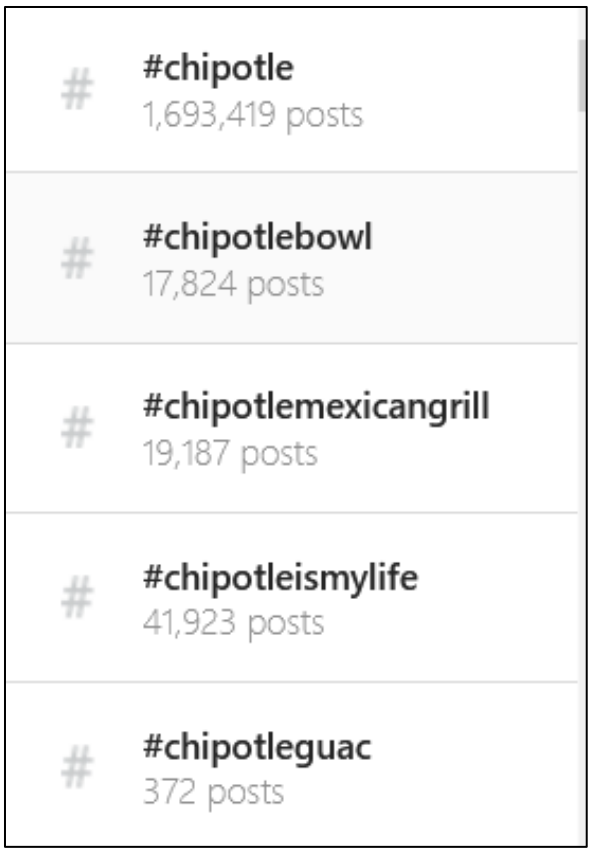
That "branded hashtag" encourages Bass Pro Shops fans to post content around outdoor hunting, fishing, and other activities and feature Bass Pro Merchandise. It has over 365,000 posts. As you research hashtags, Instagram will tell you the volume of posts for any hashtag. Enter the hashtag in the search box and hover over it. Here's a screenshot for #basspropshops:



And here's a screenshot of the hashtag itself:

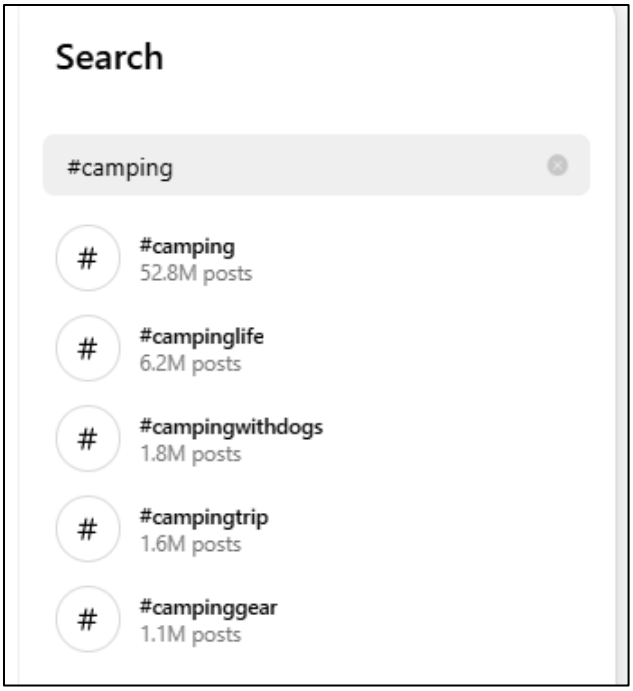


Many big brands have "branded" hashtags, even if they do not feature them in their bios. You can usually guess if there is a branded hashtag by simply searching by the brand name on Instagram. For example, try typing in *#Chipotle,* and you'll see something like the following pop up via Instagram autocomplete:



This means there are approximately 1.6 million posts related to Chipotle on Instagram. Massive user engagement results in substantial free publicity for the brand. But this didn't just happen. Chipotle nurtures its **branded hashtag** with publicity, shoutouts to key fans, contests, and challenges. Your task here is to determine if you have (or can cultivate) enough superfans to make a branded hashtag worthwhile for your own company.

You can also use this feature for hashtag research; start typing a keyword or theme of interest to your company. For example, here's the search for #camping:



Inventory Competitors and Companies-to-Emulate

As with all social networks, examine competitors and big brands through the lens of not only a user but also a social media marketer. What do you like? What do you dislike? What features are enabled, such as clickable contact links, branded hashtags, or the new shop feature? Take this knowledge back to your own Instagram account, enable what you like, and disable or ignore what you don't.

1. Identify **competitors** and **companies-to-emulate** on Instagram.
2. Inventory their **structural features** such as profile picture, shop, story highlights, reels, bio, tabs, etc.
3. Drill down into key features, such as "reels" or "shop," and investigate whether these might work for your own company.
4. Look for **user-generated content** around the brand, especially via branded hashtags as well as hashtags relevant to your business.

Once you know a question, such as "How do I tag products on Instagram?," you can literally "Google it" to find an answer, visit YouTube for helpful videos, or refer to the Instagram help files at **https://help.instagram.com/**. Instagram also has more advertising-focused resources for businesses at

https://www.facebook.com/business/instagram. Don't miss "Creators for Instagram" at **https://creators.instagram.com/**, which offers a wealth of valuable content for marketers. You can also ask ChatGPT your Instagram questions.

> **AI PROMPT.** Explain your Business Value Proposition and target buyers to ChatGPT. Then prompt it with, "Now that you know my business and my target buyers, please identify the top ten companies (and their Instagram accounts as URLs) that I might want to emulate on Instagram. I'm looking for brands that do Instagram well with strong content, likes, comments, and shares that are similar enough to my company to inspire me with content ideas."

The Elements of an Instagram Post

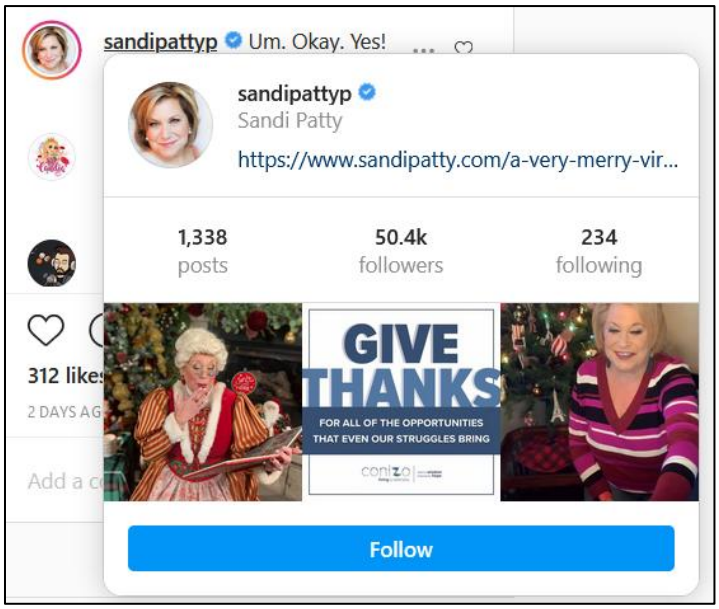
While superfans will visit and follow the profiles of key brands, most of the action on Instagram is on the feed itself. Thus, beyond the account setup issues, you want to research the "content strategy" of competitors and companies to emulate. Let's dig into the content strategy of these three brands – Chipotle, Wendy's, and Rustic Cuff.

The simplest is a post that has a caption plus an image. Here's a screenshot from Rustic Cuff promoting a holiday bracelet:

Make a note of the key elements, such as:

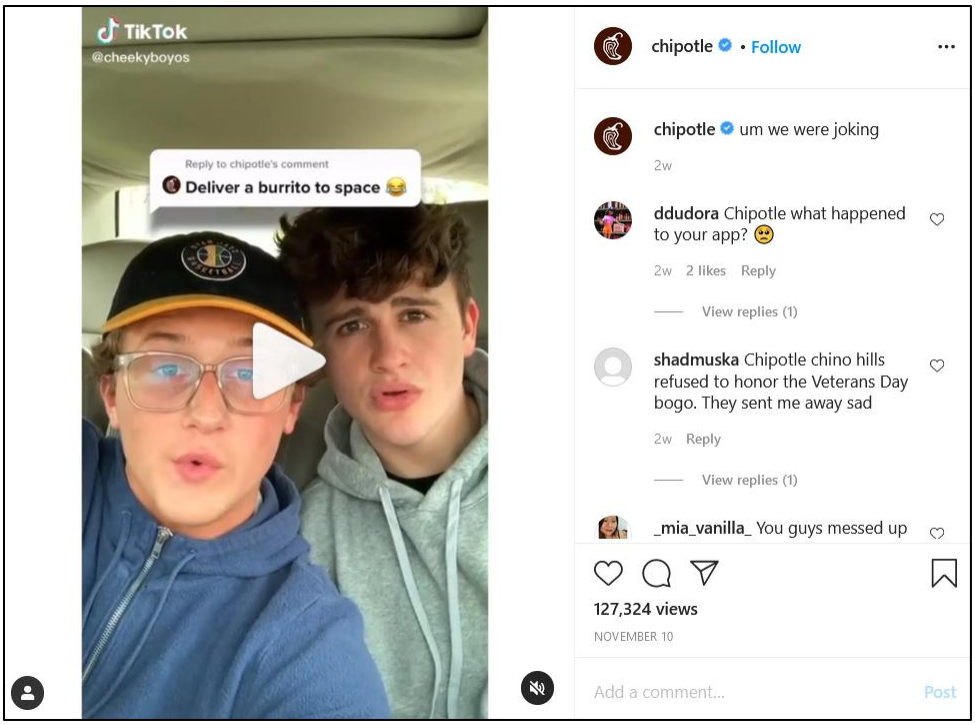
- **A beautiful photograph**. Instagram is all about photography, so your photos and videos need to be top quality.
- **A relevant caption**. Instagram allows you to write a summary. Here, the brand is asking its followers to "Take a stroll down candy cane lane."
- **Hashtags**. Instagram is very friendly to hashtags. Just as we saw on X, hashtags are conversational themes on Instagram. Thus, *#TisTheSeason* is a more general hashtag, and *#RusticCuff* is the branded hashtag.

Note that Instagram is also very open. You can see not only the "likes" and "comments" on this post, but you can also click on any person who has engaged with it and see their account. You can even follow them. If you hover your mouse over them, Instagram will display information about that account. Here's a screenshot:



You can thus see Sandi Patty as a follower of Rustic Cuff. On X, you can click over to her account. You can even message or follow her via the platform. Instagram, unlike X, but like Facebook and LinkedIn, is extremely open. Just don't be creepy.

Brands can also post video content. Here's a video posted by Chipotle to its account of two "superfans" who attempted to launch a burrito into space:



Note that this had 127,324 views! You can watch it at **https://jmlinks.com/54z**. It's hilarious, and it's a fantastic example of user-generated content that has gone "viral."

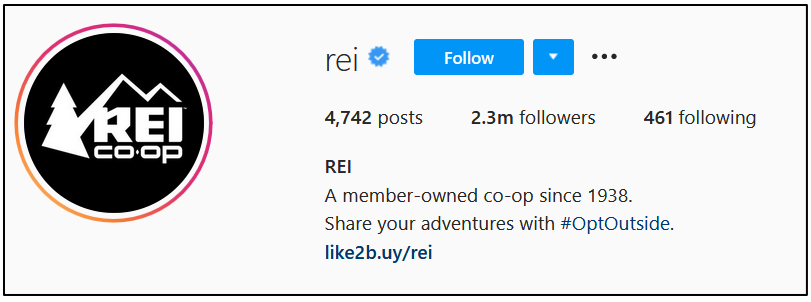
You can post about anything on Instagram, but the posts by brands that do the best fit the culture of friends, family, fun, and photos. Keep it simple. Keep it fun. And keep it photogenic to succeed on Instagram.

For instance, here's a post by Wendy's just before Halloween:

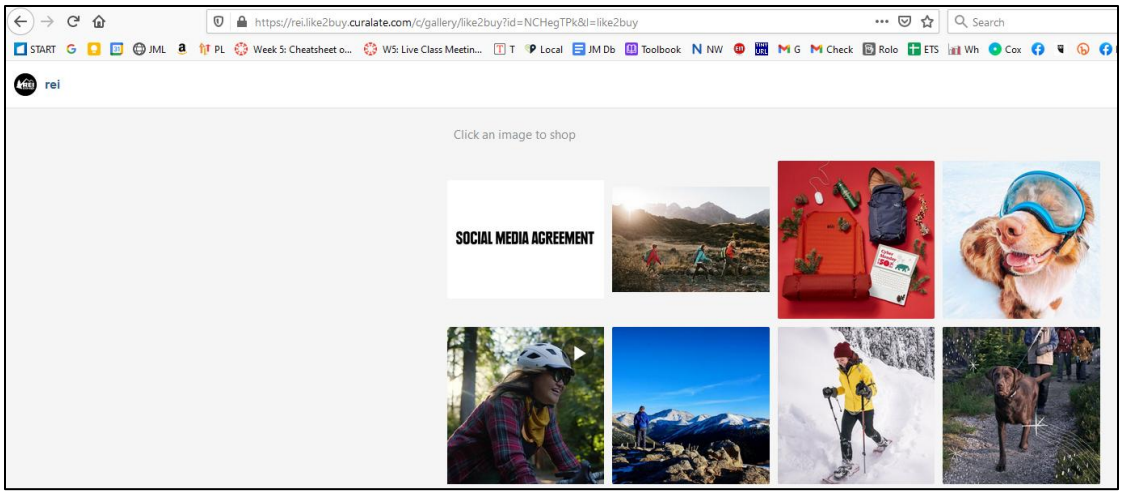
In terms of content marketing, note how it is piggybacking on a very popular holiday, and it mimics the kind of content that users create and share. The brand is fun, friendly, and (to some extent) fake – just like "real people" on Instagram.

Link in Bio

One of the peculiarities of Instagram is that it does not allow link-sharing in posts. (You can share links in your bio, stories, ads, and shop (tagging products)). Unlike on X, LinkedIn, or Facebook, you can't post a link that goes from Instagram outbound to a website. Thus, for organic content, brands usually refer to "link in bio" and direct users to their bio. As we shall see, some brands use services like Curalate or Link.Tree to work around this limitation. Here's a screenshot of REI, which uses the like2b.uy service:



You can check this out at **https://rei.like2buy.curalate.com/** and notice how it mimics their actual Instagram account:



And here's a screenshot of that second post in red with the "link in bio" reference:

Curalate (now part of Bazaarvoice (**https://www.bazaarvoice.com/)**) is one service that allows a link in bio. Freebies are Link.Tree (**https://linktr.ee/**) or LinkIn.bio (**https://later.com/link-in-bio/**). In any case, the pattern is for your organic post to say, "Link in bio," and then to utilize a service that allows users to find what they want to check out quickly.

Instagram Sharing

New for 2026 is the ability for users to share their posts with their followers. To do this, they click on the "share" icon at the bottom of a post, which looks like two arrows. Thus, *one* user can share with many followers, and one user of the original sharer can

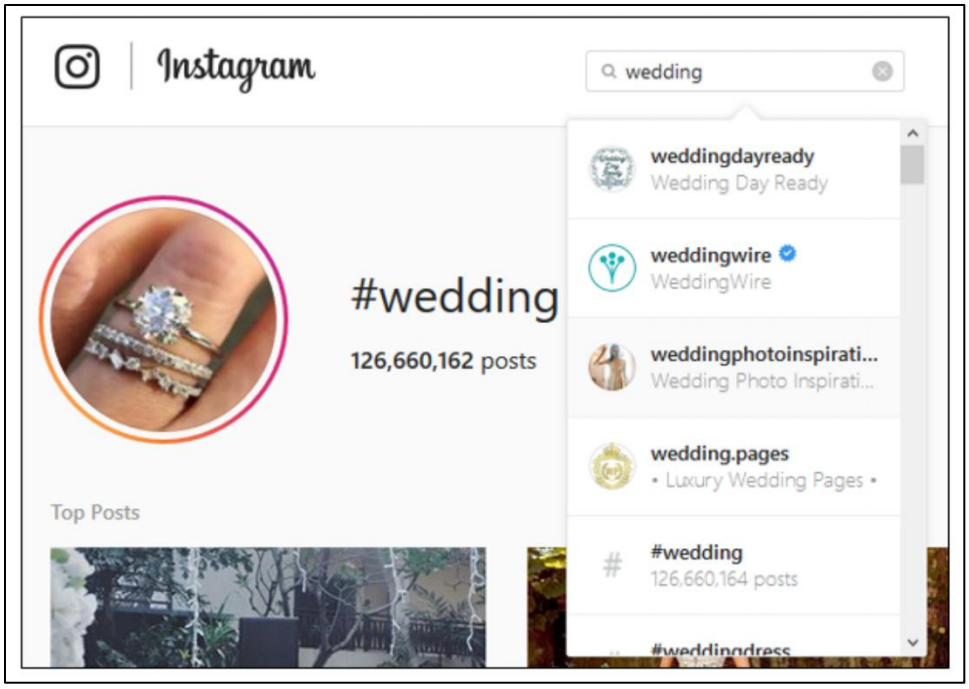
reshare with many of their followers, and so on. This allows content to be shared and reshared quickly, helping it to "go viral." Here's a screenshot:

A similar feature is called "Broadcast Channels," available to professional accounts. This, however, is more of a "DM" (direct message) feature, allowing one DM to be sent to multiple recipients. Read more at **https://jmlinks.com/76z**.

Searching Instagram

As you get started, an easy way to find posts and brands on Instagram is to use the desktop version for market research. This provides a large screen, allowing you and your team to collaborate on researching what's relevant to your brand on Instagram.

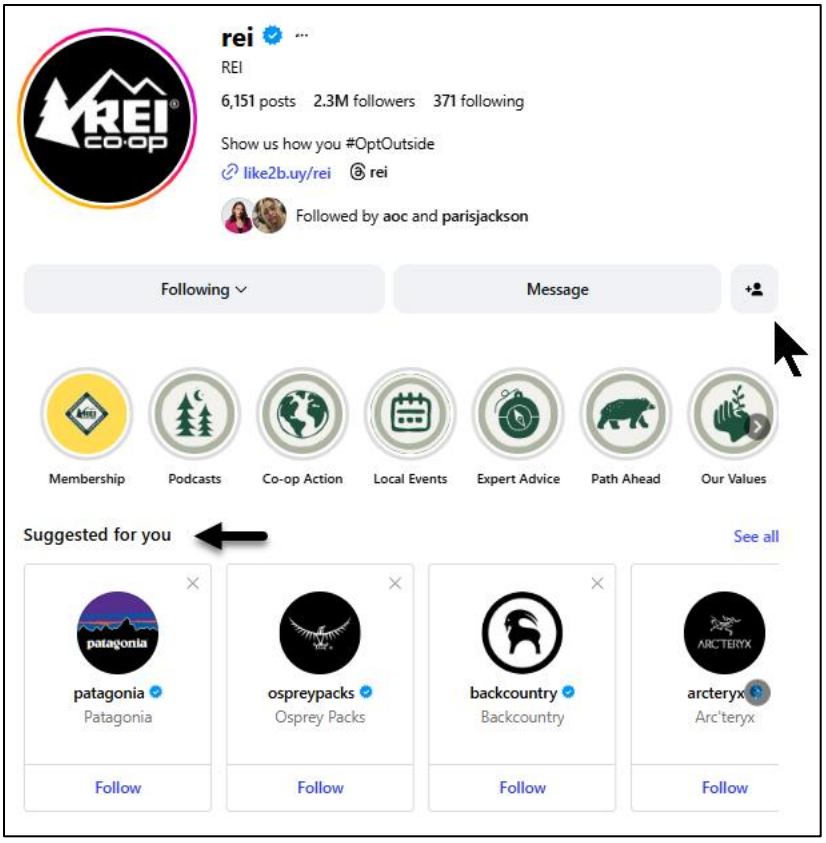
Just enter keywords like "organic" or "weddings" into your Instagram search, and you can browse posts and thus find people and brands to follow. If you enter "wedding," for example, it will display possible accounts to follow in the pull-down menu. Here's a screenshot:



If you put the "#" sign in front, it becomes a hashtag, which is more about finding posts than accounts, as in *#weddings*. Try typing in some of your keywords with the # (hashtag) symbol; remember that hashtags have no spaces, so it's *#valentinesday* not *#valentines day* or *#valentines #day*. As you find posts, click on them, and you can see the poster's account at the top. You can click "Up" to check them out or click "Follow" to follow that account. Here's a screenshot:

You can also use Google to search Instagram. Go to Google and type in "site:instagram.com {keyword}" (without a space between "site:" and "instagram.com"), for example, "site:instagram.com organic" or **https://jmlinks.com/45f**. Using these techniques, identify brands that are either competitors to you, in or near your industry, or are excelling on Instagram as marketers. Look for ideas in terms of how they set up their account and, most importantly, what and how they are posting on Instagram. Which posts are getting the most likes and comments? Which features, such as "stories" or "shopping," are enabled, and why?

Another trick as you explore competitors and companies-to-emulate is to first visit the account of a competitor or brand you want to emulate. Then click on the "plus person" icon on the right. Here's a screenshot:



This leverages the algorithm to say "if you follow this company," "you might also follow these companies." Your goal is to build a list of companies-to-emulate and "reverse engineer" their content strategy.

Instagram Stories and Reels

Instagram Stories are quick updates of a "day in the life" (of a friend or brand). They now reach over 500 million daily users. 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. 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 **https://jmlinks.com/27n**. Note that you can post the same content to Facebook Stories, giving you a two-for-one advantage, and the organic reach of Stories is better than that of posts.

You can easily see the marketing opportunity for a business to post a fun, provocative "insider" story on Instagram, allowing customers, fans, and superfans to gain insider information and fun insights about the business. Imagine a pizza restaurant posting an Instagram story about "how we make our incredible pepperoni pizza," or a fashion

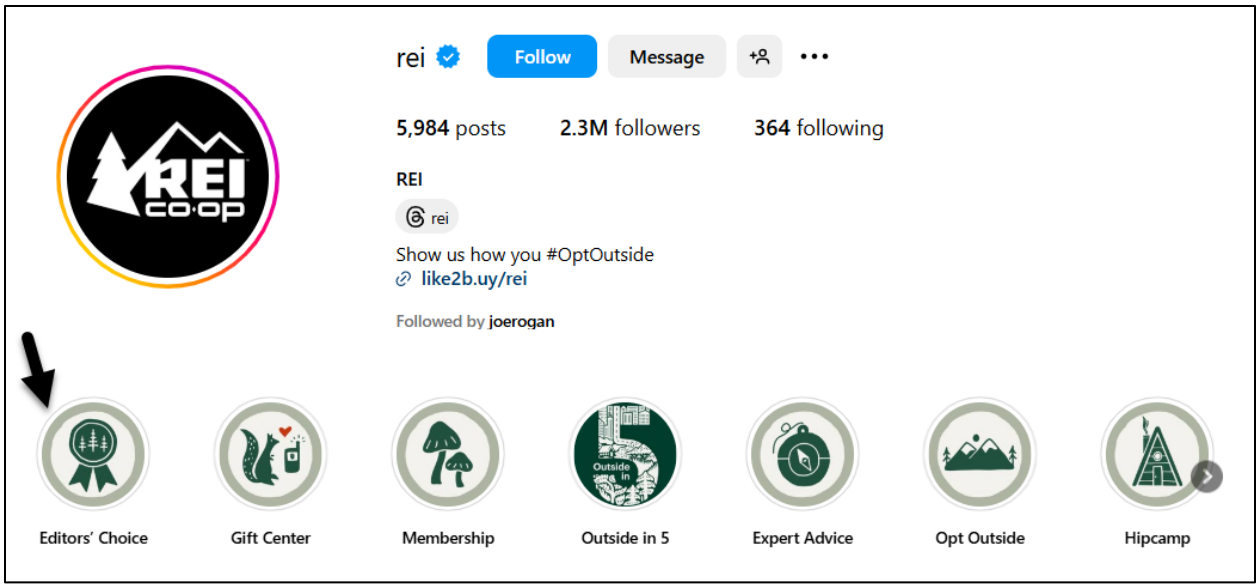
designer sharing his daily shaving and grooming routine. "Insider stories" are what brand stories are ultimately about on Instagram. Check out your competitors and companies-to-emulate and see what they post to their stories; reverse engineer the marketing message nestled inside a good "story." To view a story by a competitor, find their account, verify that their profile picture is encircled in red, and click on it. If they have a story, it will play the video or start the slideshow.

Here's a screenshot of a story from Rustic Cuff:

Rustic Cuff does a great job with stories. Notice how their stories are "behind the scenes" content and that this content is optimized for their "superfans."

Here's a problem as you "reverse engineer" competitors and companies-to-emulate, however. Stories are "temporary." They disappear after twenty-four hours. If a brand or person you follow has a story, you can see it ONLY on the mobile version of Instagram. Here are where and how stories appear:

1. **On your home screen, stories appear across the top in circles.** Click on a circle to view the "story" for a brand or person that you follow. Note: this is the big marketing opportunity for organic reach via stories: get customers to "follow you," create as many stories as you can (especially engaging ones!), and then these stories will appear at the top as your customers log in to Instagram. *#freeadvertising.*
2. **On the timeline of the brand or person.** Search for a brand such as "Chipotle" or "Kool-Aid." Then tap on their "Profile picture" on the top left to view their story. If they have one, it will pop up. If they don't, nothing will happen. Stories can also appear permanently in "story highlights," which are little circles beneath the profile picture. REI (@REI, (**https://www.instagram.com/rei**) has done an outstanding job using story highlights. Here's a screenshot:



Reels: Instagram's Answer to TikTok

"**Reels**" is Instagram's rip-off of TikTok. Users and brands can upload quirky, musically-oriented videos to the platform. Check out Chipotle at **https://www.instagram.com/chipotle/reels/**. Similarly, if you know the account handle, you can quickly see any reels that they have posted. Substitute the handle for "Chipotle" in that URL, as in **https://www.instagram.com/burgerking/reels/**. You can also click into an account and click on the "Reels" icon, both on the desktop and on the phone.

Reels is a significant development for Instagram. All video content on Instagram is now reels. Essentially, therefore, video on Instagram is referred to as Reels, and Reels are indeed videos.

Suffice it to say that you can repurpose TikToks as Reels on Instagram (Reels on Facebook, and Shorts on YouTube), and that Reels now show in the "feed" on Instagram. The race is on between Reels and TikTok, and only time will tell which will win!

The other key element of Reels is **discovery**. Whereas posts generally appear in the feeds of people who follow your brand, Reels can appear in anyone's feed. Thus, dog people might see your "dog" reel, cat people might see your "cat" reel, and iguana people might see your "iguana" reels, *even if they have not "followed" you on Instagram*. Reels offer a significant opportunity to put your brand in front of new prospects and customers who share common interests with your brand. REI excels in this aspect of reels, producing a wide range of fun, informative, and "how to" content that extends its brand via **https://www.instagram.com/rei/reels/**.

More Exemplary Instagram Business Accounts

Here are some additional brands that excel on Instagram. Pay attention to their account setup, including branded hashtags, use of the "shop" feature, stories, story highlights, Reels, and other content. Then, focus on what they're posting, not just in terms of photos, but also in terms of captions, hashtags, and user engagement.

Auntie Anne's at **https://www.instagram.com/auntieannespretzels/.** This is a pretzel shop that blends funny organic posts about food, beverages, and pretzels with more brand-promoting content.

Black Plague Brewing at **https://www.instagram.com/blackplaguebrewing/.** A small, microbrewery that combines guys, pints, and shots to make it almost as fun to watch on Instagram as it is to drink beer with friends.

Patagonia at **https://www.instagram.com/patagonia.** Yes, nature and gear brands have it easy (looking at you @REI), but still. This brand effectively blends fun content and promotional content on Instagram.

Foundr Magazine at **https://www.instagram.com/foundr/**. This magazine uses Instagram as a platform for sharing a quote of the day and inspirational messages, focusing on entrepreneurs.

Bass Pro Shops at https://www.instagram.com/bassproshops/. This outdoor retailer shares content related to fishing and outdoor sports, and does a great job with contests.

The Pioneer Woman at **https://www.instagram.com/thepioneerwoman/**. Another account that's native to my home state of Oklahoma, the Pioneer Woman, shares recipes and cooking tips for those who "love butter" and love to cook. Notice how she uses the "Story Highlights" feature to showcase recipes. Yum!

Museum of Sex at **https://www.instagram.com/museumofsex/**. This New York-based museum pushes the envelope of what's allowable on Instagram and promotes itself as a "must-see" destination in New York City. Instagram is very much part of "pop culture," and "sexy" and "Instagram" are a natural combo. Try the hashtags #*sexy* or #*muscles*, and note that any brand that can leverage our fascination with the body, hedonism, looking good, and being sexy is a great fit for Instagram.

Banksy at **https://www.instagram.com/banksy/.** Banksy is an "underground" artist who uses social media and social sharing to build one of the weirdest brands on the Internet. Check out his movie, "Exit Through the Gift Shop" at **https://jmlinks.com/45g** for a through-the-looking-glass look at art and brand-building.

Topshop at **https://www.instagram.com/topshop/**. This account focuses on women's fashion and trends, with a strong presence on Instagram. Check out #*topshopstyle* for its brand hashtag and watch how it engages users to share themselves wearing Topshop styles. Please note (only on the app) the "shop" feature again.

Aeromexico at **https://www.instagram.com/aeromexico/.** The Mexican airline, as we shall discuss in a moment, does a commendable job of leveraging adjacent fun themes of places to visit in Mexico, as opposed to just the "boring" aspects of air travel.

Outdoor Voices at **https://www.instagram.com/outdoorvoices**. Yet another brand that is smart enough to have Instagram shopping fully enabled.

TSA at **https://www.instagram.com/tsa/.** Yes, that TSA. Bored workers and ridiculous restrictions at airports become a funny brand account on Instagram that shares travel tips and dad jokes. And you thought government bureaucrats weren't funny.

The goal is to identify competitors, similar companies, and those to emulate. Then "lurk" behind the scenes and "reverse engineer" what they're doing at a technical level with features like branded hashtags, Instagram shops, stories, Reels, i.e., what they're doing at a content level in terms of what they're posting as images, videos, and text captions, and what's getting engagement from their fans (and why).

The Instagram Game: Followers, Likes, and Engagement

As on other social media networks, the game on Instagram is to get people to follow your company, and once they follow you, get them to like, comment, and share ("send") your posts to their friends, family, and contacts.

Engagement is the key to successful content marketing on Instagram, so you need to brainstorm fun and provocative photo or video content that engages your users. Meet users where they are on Instagram, which is a platform for having fun, sharing, and watching their "perfect life," as well as messaging their friends or besties about trendy trends. And don't just post photos. Post videos to Reels and Stories, as both have better organic reach than posts.

LIKE ALL SOCIAL MEDIA, INSTAGRAM CRAVES ENGAGEMENT

Instagram, like Facebook or X, follows a timeline and news feed structure. 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 with my own friends. In this way, Instagram is very much *X 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, sort of a "day in the life" of a friend or brand you follow.
>
> **The videos/pictures/stories posted by User A appear in User B's newsfeed if they're connected.** Instagram, like Facebook, also monitors interaction as a "recommendation engine." Hence, dog enthusiasts receive more dog-related posts, and friends who like dogs get even more posts about dogs, and so on.

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. Individuals can also have "professional" accounts (either "business" or "creator"), which give them access to robust features and metrics. Learn more at **https://jmlinks.com/77a**.

Instagram shopping is a "must enable" if you are a brand selling to consumers. Anything that is fun (or fun-adjacent) and photogenic, and connects to online purchases, should work well with an Instagram shop. Learn more at **https://jmlinks.com/77b**.

Users can like, comment on, or share posts by others with their own followers. New for 2026 is that users can "repost" content on Instagram, although this feature has yet to gain significant traction. To do so, find a post you want to recommend. Look for the "repost icon" underneath it. It resembles two arrows surrounding a square. Now, flip this concept around. Try to encourage *your* Instagram followers to repost your content to *their* followers, as you might do on other platforms like X, Facebook, or LinkedIn (which have always allowed reposting).

Reels. Reels is Instagram's answer to TikTok. Users post fun, short, and vertical videos to Instagram, and they appear both in the feed and on the Reels tab. These are recommended not only to people who follow your brand account, but also to those who show similar interests. Thus, people who enjoy fishing would see Reels by vendors like Bass Pro Shops, and those who prefer Mexican food might see Reels by Chipotle.

Stories. Stories are short videos or photo montages, a kind of "day in the life" of a person or brand. The good news for brands is that stories have good organic reach, so post brand stories. To check out Stories, either look across the top on your home screen or visit a brand you follow and click on their profile picture (if it has an active circle). "Reverse engineer" the brand stories of your competitors and companies-to-emulate.

Business Accounts, Personal Profiles, and Creator Accounts

While there's no clear distinction between **business** and **personal** profiles in terms of the basics, it's best to choose a business account for your business. (Note: just to confuse us, it's called a Business *Page* on Facebook and a Business *Account* on Instagram).

A Business Account 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. First, set up a Business Page on Facebook, and then open up the Instagram App to set up a new Instagram Business Account. You can (and should) also unify these accounts in Meta Business Suite and Meta Ads Manager, as of course, Meta manages both Facebook and Instagram advertising.

Note: to set up a business profile on Instagram, you'll have to do this first on your phone by "signing up" as an individual. You can read the official step-by-step guide to setting up a business account on Instagram at **https://jmlinks.com/57k**.

Professional Accounts are a hybrid – these are basically personal accounts, focused more on brands and brand mentions than on selling actual stuff. They can be subcategorized as either business or creator. A good example might be the personal account of a business owner (as a creator) versus the company account, or an influencer account of someone who wants to earn money through brand deals.

Managing Multiple Accounts

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." You can manage up to five accounts on Instagram via one phone and one app install. Once you have more than one account on your phone, you can switch between accounts. To read the help file on how to set this up, visit **https://jmlinks.com/27m**.

Rumor has it that posting "natively" via the phone generates the best organic results compared to posting via a desktop or a third-party app like Later, Buffer, or HootSuite.

» 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 happening 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. Like any good party planner, you want to figure out if your target customers are on Instagram and 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, consider for a moment what you, your friends, and your family are doing on Instagram, setting aside companies and brands for the moment. Suppose I look at myself as well as my friends and family on Instagram. In that case, it's pretty clear that 99% of what people are doing on the network involves paying attention to friends and family as they have fun in their daily lives, taking photos (and videos), and posting these

to their Instagram Stories or Reels. At its core, Instagram is essentially a multiperson scrapbook that shares photos and videos, mainly of the "fun stuff" in one's life.

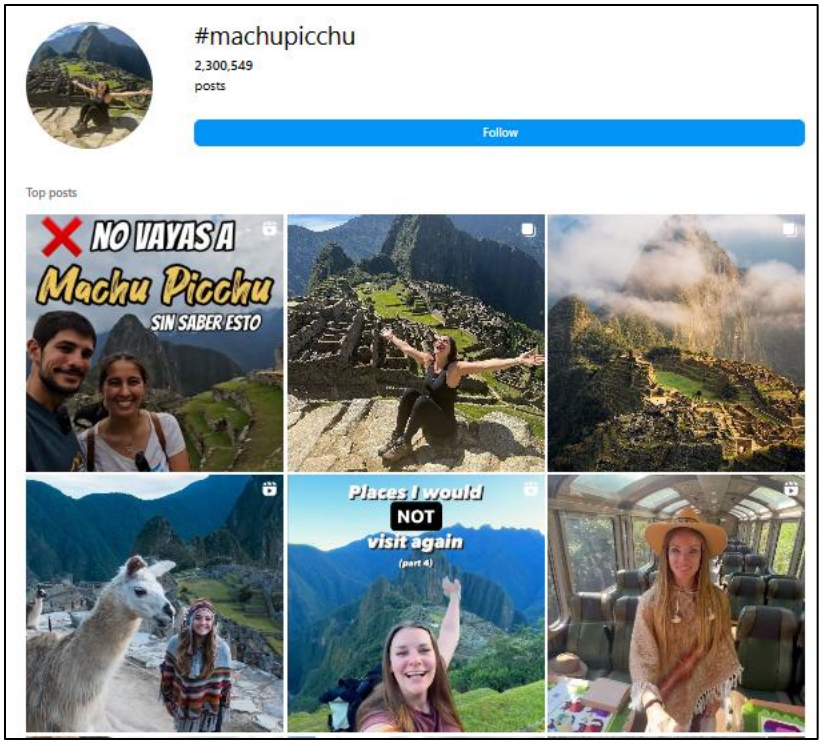
However, there are three major trends on Instagram. One is friends and family who share photos of their lives (admittedly exaggerating the positive and downplaying the negative). The other is consumer brands like Target, REI, and Gucci, as well as consumer personalities like the Kardashians and other influencers who are "all in" when it comes to consumerism, materialism, and hedonism. The third is content creators or influencers, who are people who fully embrace consumerism and are passionate about consumer products (and share content about them). Google "Instagram Influencer Marketplace" to find both Meta-endorsed and non-Meta marketplaces that connect influencers with brands.

Is Instagram fake? Absta-INSTA-lutely. Like Facebook, Instagram is more "life as it should be" than "life as it really is." Instagram tends to be very **show-offy** as people post photos of themselves, their families, their friends, and their super cool, amazing, perfect life to "show off" how great their life is (vs. your sad, pathetic, boring life and dysfunctional family). Big brands and celebrities are even more so. The Kardashians, for example, are (probably) an example of this sort of Insta-fantasy. Check out Kim at **https://www.instagram.com/kimkardashian/**, or Khloe at **https://www.instagram.com/khloekardashian/**. I love the Kardashians, I must admit. I just don't particularly believe that what they project about their lives is "reality."

> **AI PROMPT.** Take an account that is a competitor or company to emulate. Copy the URL as in **https://www.instagram.com/rei**. Prompt ChatGPT: "Take a look at this company-to-emulate at **https://www.instagram.com/rei**. Analyze their content strategy on Instagram in terms of content types (photos, videos, Reels, stories) and their actual content (posts by the brand, UGC content, contests, challenges, etc., as well as themes). Write a 500-word summary of their Instagram content strategy with recommendations for my own brand."

There is also a lot of "**virtue signaling**" on Instagram – people live lifestyles, promote causes, support or detract from issues, etc., in such a way as to "signal" that they live a virtuous life (vs. you other shmucks out there, who don't care about global warming, puppies, motherhood, our troops, or other fill-in-the-blank virtuous causes, plus you have bad skin, don't vacation in interesting parts, and do not partake of fine wines or fine dinners. In fact, you might call this the "narcissism" strategy of Instagram content marketing. Create or nurture content that allows your customers to "show off" how awesome they are using your product or service.

Disney does this *(# Disney, # Disneyland, # DisneyWorld*). REI does this *(#optoutside*). Even Machu Picchu, *#machupicchu* (the lost city of the Incas), does this. Look it up and you'll see selfie after selfie showcasing people "living their best life". Here's a screenshot:



You can ask yourself how deeply these people went into the history and culture of the Inca or of modern-day Peru, or whether this historical and cultural site is being transubstantiated into a trinket of modern narcissistic show-offiness. Or, if you visit the Wikipedia article on selfies (**https://jmlinks.com/74n**), you'll find a list of injuries and deaths occurring as people go to dramatic lengths to take selfies (many of which end up on Instagram) to show off their "amazing" lifestyle. The annual number of "selfie" injuries apparently exceeds 30,000 worldwide, with numerous "deaths by selfie" recorded.

Now, you and I are marketers. We can't change human nature, nor the human desire to show off and appear virtuous or cool. But we can use it to encourage our own customers to showcase how our "brand" helps them "live their best life." Branded hashtags, contests, and challenges are just the beginning. Monitor your competitors and companies to emulate for ideas on how they motivate their customers to take a selfie, hashtag it, and share it with their friends and family. Identify photogenic ways for your own customers to make you the "Machu Picchu" photo opportunity of your industry.

UGC content on Instagram about brands almost always leverages the "show off" nature of modern consumer culture. *Look at me! I have a gorgeous body, cute partner, and lots of expensive clothing, gear, and material products, while I'm living my best life and taking selfies to show it off… oops I walked too far backwards off the cliff, and bye bye bye as I send my last Instagram reel before meeting my end.*

> **AI PROMPT.** Ask ChatGPT to analyze your own brand plus target buyer personas. Prompt it: "Knowing what you know about our brand and target buyer personas, please give me ten easy content ideas that are likely to encourage followers to create UGC content of their own that promotes our brand."

The marketing point is that innovative brands leverage customer **narcissism** and the **desire to show off**; they encourage customers to "showcase" that they are "living their best life" by using the company's products or services.

INSTAGRAM ENCOURAGES BRANDS AND USERS TO "SHOW OFF"

A significant portion of Instagram content consists of fashion photos. It's as if the old-style glossy magazines of the supermarket went online and took over a platform. Choose your favorite fashion brand, whether it's Gucci (**https://www.instagram.com/gucci/**) or Gap (**https://www.instagram.com/gap/**), Old Navy (**https://www.instagram.com/oldnavy/**), or OshKosh B'gosh (**https://www.instagram.com/oshkoshkids/**), and you'll find brands and consumers using Instagram as a visual shopping platform. See it. Like it. And now, you can buy it via Instagram shopping. If you are a B2C brand and you're visual, Instagram becomes a "must-do" social platform. The strategy here is to visually showcase high-quality clothing, products, and services.

Search by Location

Let's explore some additional techniques for browsing Instagram and identifying marketing opportunities. One good way to see what "real people" are doing on Instagram is to search by location.

Go to Instagram and type in a city, such as Pittsburgh, Tulsa, or Houston. To browse Instagram posts on Tulsa, for example, visit **https://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 daughter post that's been tagged with *#Tulsa*:

You can then click "up" to the person who posted it, in this case, *@biggestrayray,* and see what he's posting to his account. (Note how, like X, Instagram is very open – many people have little idea just how public what they do on Instagram is).

You can also find location-based posts by neighborhood or landmarks, which is particularly useful for local businesses in a specific area. For example, check out *#downtowntulsa* (Downtown Tulsa, Oklahoma), *#brooksidetulsaok* (Tulsa's Brookside neighborhood), or even *#tulsafarmersmarket* for things around Tulsa's best farmers' market. Search for neighborhoods and landmarks in your city or town, and discover through Instagram what people post that's location-specific. Find brands you like (or compete with) and drill into the accounts of people who are interacting with brands. **Geotags** are a special feature – when you're on the app, click on "add location." These insert a geotag vs. a hashtag. Geotags help posts appear on the "explore" page of users who are nearby. If you're local, I recommend using both the local hashtag, such as # Havana, and the geotag by telling Instagram the location of your post.

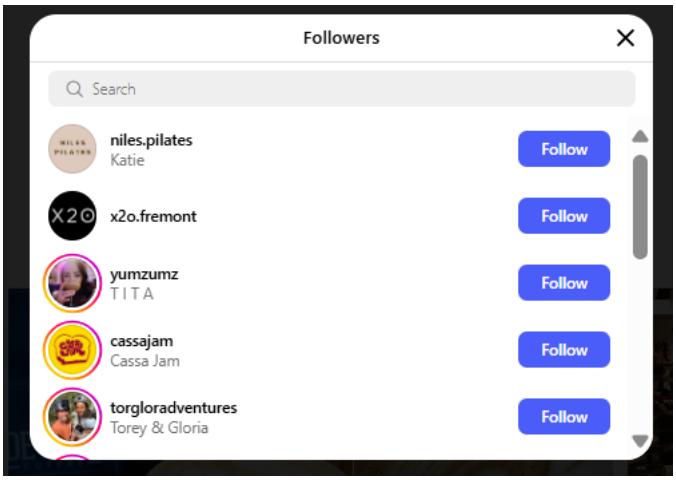
Another local strategy is to advertise on Instagram and set the geo-target to your local city or neighborhood. Instagram, while mammoth, also has a very local side to it.

Research the Fans of Your Competitors

You can find a competitor and then literally drill into their fans. The easiest way to do this is on the desktop; however, you can also do it through the phone app. Here's how:

1. Find the Instagram account of a competitor or company you want to research. We'll use Devout Coffee (**https://www.instagram.com/devoutcoffee**), an artisanal café located in Fremont, California.
2. Click on followers at the top. This then pops up a list of everyone who follows them. You can literally click "follow" in blue to follow that account or click on the account name and check them out.

Here's a screenshot of how easy it is to "see" the "followers" of Devout Coffee:

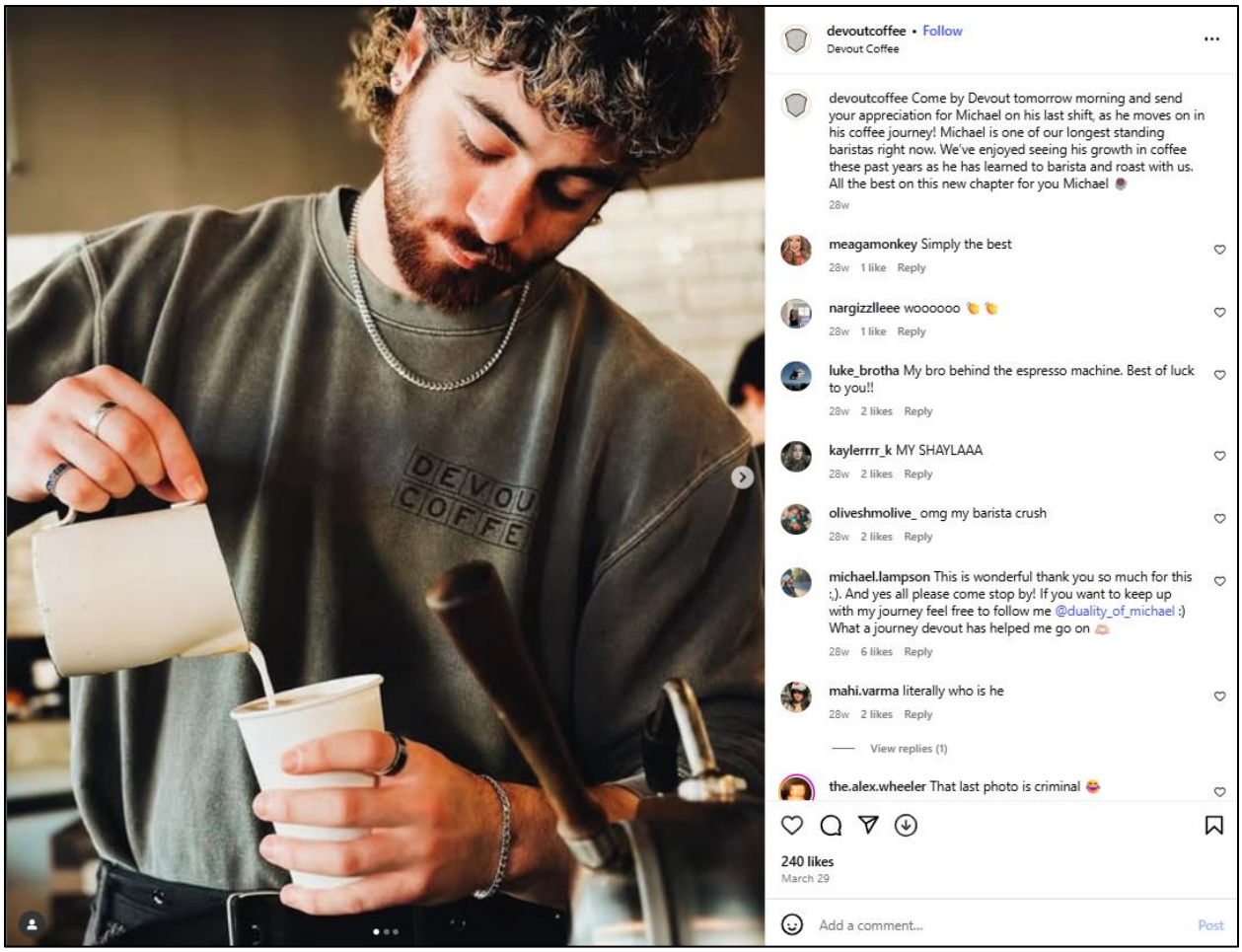


You can easily research who is following a competitor. You can even follow them. Just don't be creepy about this. Realize that when you follow someone on Instagram, they often follow you back or at least check you out. It's all very public. Additionally, there is a daily limit of 300 accounts to follow, with a lifetime limit of 7,000. So, if you rapidly follow accounts, you'll get blocked. But as a research tool, this is a great way to investigate who's following a competitor and how fervently. "Follow for follow" is also a promotional tool; within reason, people who follow your brand account will tend to follow you back (or at least check you out). So, consider "following" key people who "follow" your competitors.

You can also drill into a competitor's post (vs. their entire account) and see which posts are the most popular as measured by likes and comments. Find a competitor, click on

one of their more popular posts, and then click over to those people who liked it or commented on it. If you click on the "likes," or "comments," you can see all the people who liked or commented this post and click over to their accounts, too.

Here's a screenshot of another post. Look at the comments and the bottom at the "likes." These are clickable, showing who did what vs. the post.



You can also see who "tagged" a brand or personal account by clicking on the "tag" icon (far right). "Tagging" generates a notification to the "tagged account," so another strategy on IG is to "tag" your superfans and customers. Instagram is a "social" platform so by encouraging likes, comments, shares, and tags you can build relationships with your brand customers and superfans.

I would not recommend following each person who likes a competitor's account or posts. However, in terms of research, it provides a window into your competitors' Instagram strategies, including what they post, what generates engagement, and even the types of people who engage with their posts. As you browse accounts, you can see

how many followers they have and thus get a crude measurement of their clout on the network. Utilize the public nature of Instagram in your marketing research by identifying companies similar to yours, examining their posting/content strategy, and even delving into their fan base.

Business Strategies on Instagram.

With some basics under our belt, let's revisit what brands are doing on Instagram. Remember – unlike a person – a brand isn't on Instagram "for fun." Instead, whether it's the camping gear retailer REI, the Mexican airline Aeromexico, fast food chains Wendy's or Chipotle, or jeweler Rustic Cuff, brands have an ultimate **goal** for Instagram: **to sell more stuff**. I think you could argue that this is also true for personal brands like the Kardashians, who are more brands than real people if you think about it.

Suppose you work backward from the "ultimate goal" of selling more stuff. In that case, 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 Rustic Cuff is a good gift to buy online. And when you look to people to emulate as lifestyle leaders, you look to the Kardashians (Or not, depending on your values).

Instagram is about image and the projection of one's "public persona." It's about knowing who your target audience is and who it is not. It's about engaging in a communicative, visual dance with them through photos and videos. Content marketing on the platform is thus about the visual show-off nature of the "cool" and "trendy," as well as the aspirational elements of our consumer culture. Brands build out their own content, nurture superfan UGC content, and engage in interactive content (such as "tagging" fans)… with curated content nearly absent from the platform. Examine your competitors and companies-to-emulate from the perspective of content marketing, and develop your own content marketing strategy. Content is king on Instagram.

Consumer Brands on Instagram

Content marketing on Instagram, however, moves beyond brand-building to "buy our stuff" marketing. Take a brand like REI (@REI), for example. (You can browse it on your desktop at **https://www.instagram.com/rei/**). REI posts photos of cool people doing cool things outdoors, with its clothing, gear, and accessories taking a backseat to the enjoyment of nature, as people simply have a great time. It's fairly evident that REI's Instagram marketing strategy involves sharing fun photos of its customers wearing or using REI gear, as well as encouraging "user-generated content"

from customers through contests and the use of hashtags like *#optoutside* (**https://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 excels in its photography, videos, and strategy, and because outdoor activities are a photogenic fit for Instagram, it's easy to see that Instagram is a significant and successful part of REI's online marketing efforts. All of these content items ultimately lead to consumers purchasing REI products. Note how REI uses Curalate's "Like2b.uy" feature at **https://like2b.uy/rei/**. Olapic's Tap-shop platform is a competitor at **https://jmlinks.com/32z**.

REVERSE ENGINEER THE BIG BRANDS ON INSTAGRAM

What you'll see on Instagram is brands leveraging photogenic product shots as well as photogenic shots *by and of* happy customers using their products and services. The genuinely great marketers on Instagram, such as REI, have figured out how to mobilize their customer evangelists to post, like, comment, and share product photos on their behalf. UGC content is king on the platform; interactive content is queen. The "shop" feature on the platform is where aspirational consumer culture meets "you can buy it now" hedonism.

Location Tagging and Narcissism

Locations are linked to narcissism on Instagram. Obviously, as we have already noted, there's a certain self-serving narcissism in our modern, ego-centric culture in which you post your "amazing" trip to Machu Pichu (2.6 million posts as of December 2025 at **https://jmlinks.com/27r**), your "incredible" trip to Disney World (19 million posts at **https://jmlinks.com/27s**), or your "meaningful" Destination Wedding (17.5 million posts at **https://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. Brand hashtags on Instagram, such as *#optoutside, #doingthings*, or *#rusticcuff*, are examples of how brands leverage consumer narcissism as a marketing strategy on the Platform.

Location tagging on Instagram is thus a significant content opportunity on the platform, similar to hashtags but with a location-specific focus. If you browse locations, you'll see plenty of narcissistic showoffiness by consumers on location. Note that geographies like Tulsa, Oklahoma (**https://jmlinks.com/33a**), Niles, California (**https://jmlinks.com/33b**), or Havana, Cuba (**https://jmlinks.com/33c**) also have geotags 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. Learn more about location tagging at **https://jmlinks.com/33d**.

INSTAGRAM TAPS INTO OUR HUMAN DESIRE TO "SHOW OFF"

Airbnb (**https://jmlinks.com/32x**), for example, is a location-specific brand that excels on Instagram and taps into the "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, a wedding photographer, or any other service in the wedding industry. Just search Instagram for the hashtag #*weddingguest,* and you'll find over 52 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 Connect to Something Fun

If your brand isn't fun, don't despair. You can connect to something *adjacent* 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 itself is anything but enjoyable. 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? Hell has come to earth, and it's called air travel.

An airline, therefore, has to "look out the window" to find truly enjoyable things (such as travel) and connect these adjacent enjoyable experiences to the non-fun aspect of air travel.

Check out United Airlines on Instagram at *@united* (**https://jmlinks.com/33e**). Alternatively, for an airline that tends to be a bit more fun, I recommend Aeromexico at **https://jmlinks.com/33f**. The point is that if your brand is serious or not-fun, brainstorm ways to attach it to more fun types of activities, especially ones that are photogenic. This strategy is at the heart of all airlines' Instagram presence. However, it also applies to B2B or more serious consumer brands. Consider Sunrun Solar at **https://jmlinks.com/45j**. That brand posts photos of solar panels, as well as outdoor nature-type photos that highlight the synergy between clean energy and a healthy outdoor environment. Here's a screenshot:

Solar panels, in and of themselves, are neither fun nor photogenic, so the trick would be to identify photos that are fun and photogenic but somehow connect to solar power. Check out the hashtags *#solar* or *#solarpanels* for ideas.

Really Unfun Products or Services: What to do?

Next, take a look at the big insurers, such as Geico (**https://jmlinks.com/33h**), Allstate (**https://jmlinks.com/33j**), or Progressive (**https://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 going over my life insurance policy on Instagram!).

Insurance is often perceived as boring, unphotogenic, mistrusted, and not exactly something the average consumer would spontaneously share on Instagram. So, what is to be done?

> **AI PROMPT.** If you are a boring, non-fun brand in a non-fun industry, ask ChatGPT to "think out of the box." Prompt: "Knowing what you know about our brand, which is not particularly fun and not photogenic, we need to think 'out of the box' for content strategies on Instagram that will still promote our brand. Give me ten ideas as bullet points for content strategies we might use that leverage Instagram's fun, photogenic, and narcissistic themes to build our not-fun, not-photogenic brand's Instagram strategy!"

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 San Lucas 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'll take a photo of myself in my coffin and say, "Wow! I'm glad I have USAA life insurance!" (Though perhaps my girlfriend 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 thirty-something with two kids in tow.

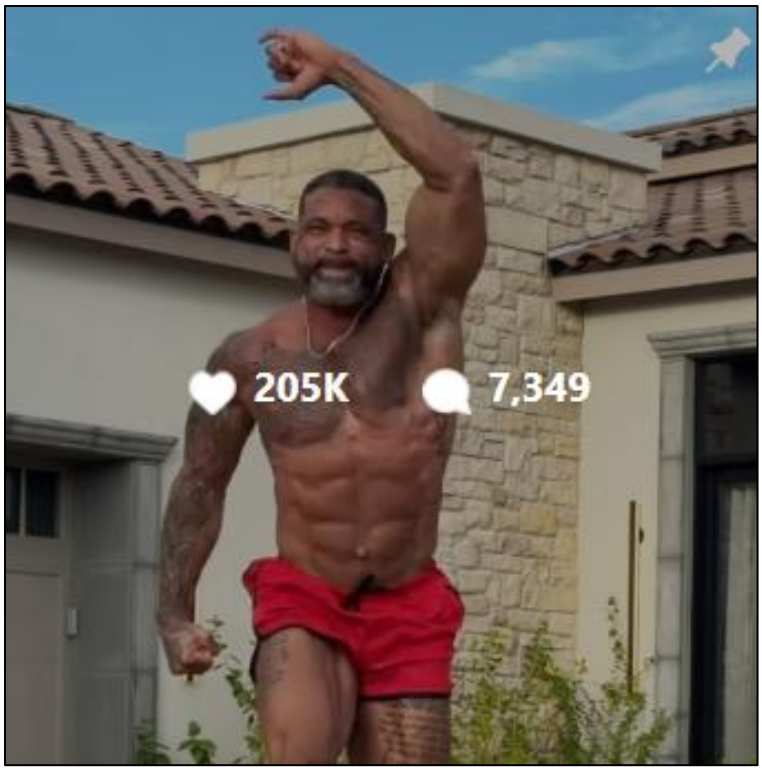
Here's a screenshot:

This post garnered 128 likes, which is far from tremendous. Still, it demonstrates the strategy of one of the country's biggest brands to associate the non-photogenic, non-fun themes of insurance with the fun, photogenic themes of Instagram.

Gurus and Personal Branding

If you or your small business can effectively explain things to people, and if those explanations can be presented in a visually appealing way, then an Instagram guru or personal branding strategy might be beneficial. 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 24 Hour Fitness at **https://jmlinks.com/33n**. Or check out the 50 million posts to the hashtag *#fishing* and 18 million to *#hunting*. These are visual sports or activities that blend the "Gee! Look at the huge fish I caught" narcissism of users with the visual "how-tos" of vendors, along with a good dose of selling and brand identity.

For a personal brand, check out fitness guru ShaunT (**https://www.instagram.com/shaunt/**). With 1.3 million followers, he shares fitness tips and tricks, along with a positive, can-do attitude. Here's a post of ShaunT dancing to fitness, with 205,000 likes and 7,349 comments – that's engagement!



Even outside of the purely visual, brands that clearly explain their products can find a niche on Instagram. Dog guru Cesar Millan (**https://jmlinks.com/33r**) uses Instagram to promote his dog training strategy to the tune of 2.9 million followers. All of these "guru strategies" blend insider tips, tricks, and secrets with a personalized view into the life and viewpoints of the guru themselves.

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 or jewelry, so Instagram is a natural and easy fit for your online marketing. (Example: *@Airbnb, @Disney*, @rusticcuff).
>
> Or
>
> You're a **non-fun brand** adjacent to a **fun, photogenic** industry, such as airlines, so Instagram works only if you attach your "non-fun" brand (air travel) to the photogenic outcome of *travel*. (Example: *@aeromexico, @united*).

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* and @*Geico* to make insurance fun or post things that have little to do with insurance but are visually fun, and then (somehow) connect this back to their brand).

This is even true for nonprofits, which should also determine whether they are fun or not, photogenic or not, for the purposes of their strategy. Your **TO-DO** 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 is @Progressive on Instagram, which shares photos of their employees enjoying the summer at Progressive Field Ballpark in Cleveland. *Baseball is fun, the ballpark is fun, and so… insurance is fun…*

Sentimentality and "Quote Marketing" 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 the preacher Joel Osteen (@joelosteen), not because I agree 100% with his theology but because I admire his marketing savviness 100%. Osteen shares inspirational bible quotes on his Instagram feed and has over 5.2 million followers.

Here's a screenshot of what I would call an "Aw Shucks" sentimentality post:

Something serious, *religion*, is connected to something beautiful, *a mountain*, with a quotation that provides *food for thought*. It's also something many religious people agree on – that God helps them in their struggles. *Aw shucks*. This post received 69,000 likes, and 2905 comments.

Businesses do this, too. Foundr magazine also employs this type of quote strategy, as seen at **https://jmlinks.com/33x**. So we have "Don't just get excited about your ideas, execute them" with 2,547 links and many comments:

Another of my favorites is @Freud.intensifies (**https://www.instagram.com/freud.intensifies/**), which mixes Freudian psychology and humor (and then sells T-shirts to make money). Inspiration, showoffiness, aspirational messaging – the "culture" of Instagram is very much "living your best life" in a photogenic way. Thus, your content marketing needs to capitalize on that vibe. We'll return to researching and "reverse engineering" brands on Instagram in a moment, but let's dive back into tips and tricks to manage your Instagram efforts better.

» Set up Your Business Page (and Learn Its Advantages)

You want to use Instagram as a business, not as an individual. When setting up your Instagram account, ensure it is configured as a business account. To do so, follow the steps at **https://jmlinks.com/45r**. If you've mistakenly set yourself up as a personal profile, follow the link to "Convert Existing Account" to convert it.

A business account on Instagram comes with many advantages:

1. **Contact Info**. Business profiles feature easy-to-find contact information, enabling users to reach out with questions. If you have an e-commerce store, you

can also apply for the new "shop" feature to enable links in the new Instagram shopping experience.

2. **Instagram Insights**. Business accounts get data on user activity, while personal accounts do not.
3. **Advertising**. Business accounts can advertise, which is very useful for growing your followers and increasing engagement. Personal accounts can't advertise.
4. **Post from Desktop Apps**. For business users, Instagram is more accessible via the desktop, including desktop software programs like Hootsuite. This makes it easier to manage.
5. **Connection to Facebook**. Since Facebook owns Instagram, Instagram Business accounts are linked to Business Facebook accounts, making management easier.
6. **Instagram Stories with Links**. Businesses can have links in their Stories and Story Highlights via the "swipe up" feature, giving you more opportunities to drive traffic from Instagram to your e-commerce store.
7. **Shopping**. Instagram is clearly all in when it comes to e-commerce and shopping-friendly. Businesses can set up a "shop" on Instagram, tag products in photos, and otherwise enable a seamless shopping experience between their Instagram account and their e-commerce store.

The main downsides are concerns that having a business profile will make your business appear "salesy" to users and that the organic reach of business profiles will suffer, just as Facebook reduced the organic reach of business Pages. It's likely that at some point, Instagram will REQUIRE businesses to convert, so this risk is there regardless of what you do. You can also try a two-pronged strategy – having a personal profile for the CEO or company spokesperson, as well as a business profile. The former can be more "behind the scenes" and "personal," and the latter more "organizational" and "formal." As always, know your brand and experiment with what will work best for you and your business.

Advertising on Instagram is managed via the Meta platform. You can set up demographic targets using all the techniques on Meta (see the Facebook Chapters to learn more about Facebook demographic targeting, which also applies to Instagram). Once you have a Business account on Instagram, you can advertise your posts to:

- People who follow your Business Page on Instagram and/or Facebook.

- People you choose through demographic targeting (such as women aged 18-24 living in Oklahoma City who are interested in weddings, etc.). Facebook and Instagram possess extensive knowledge about their users, and leveraging this data to target your Instagram posts is genuinely remarkable.
- People you choose through the Facebook Pixel, that is, people who have hit your website. In this way, you can target likely customers who have "hit" your website when they are on Instagram.

Instagram advertising is an effective way to increase exposure for your posts and expand your followers. Learn more at **https://jmlinks.com/45v**.

» LEARN TECHNICAL TIPS FOR USING INSTAGRAM

We'll assume that you've set up a business profile on Instagram and completed the basics, including adding a profile picture, filling out your bio, and 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 by using the hashtag *#Airbnb*, and Southwest Airlines does it with *#Southwest* to encourage its customers to tag photos of their Southwest trips.

Learn a Little Photography

Before we dive into technical tips on Instagram, let's take a moment and talk about **photography**. Instagram is all about photos and videos, so it's very worthwhile to become a better photographer. You can Google "how to take better iPhone photos," for example, or go to YouTube and look for photography tutorials. To read a nice, short article on how to take better Instagram photos, visit **https://jmlinks.com/45u**. 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 your photos matter a lot.

Indeed, with the rise of Stories and Reels, Instagram is promoting "vertical video" in an effort to counter nearly a century of horizontal video dominating film. Check out Meta's official blog for business at **https://jmlinks.com/45q** to learn the latest and greatest straight from the source.

Use Instagram Hacks and Techniques

Now, let's dive into some of the technical tips for 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 X, and a post can often have five, seven, or even ten hashtags at the end of it. Use a tool like RiteTag (**https://ritetag.com/**) or Hashtags.org (**https://jmlinks.com/27w**) to identify customer-friendly hashtags for your account bio and posts. Additionally, search Instagram for your keywords to identify hashtags with high volume.

Tag People. As on Facebook, you can "tag" people and thereby notify them that they were included in your feed. For example, if customer Jane Doe follows your Pizza Parlor, you can take a picture of her and her friends on her birthday and tag all of them in the Instagram app. In this way, they are all notified that they have been "tagged" and are encouraged to share the post with their own friends on Instagram.

Tag Products. If you have enabled shopping, you can take a photo and "tag" products into it. Then, when users click or tap on the photo, they can see clickable links from the post that direct them to the individual products. Learn more about tagging products at **https://jmlinks.com/74p**.

Shopping / eCommerce. Instagram does not allow clickable URLs in posts. Therefore, third-party services have emerged, such as Olapic Tapshop (**https://jmlinks.com/32z**) or Curalate's Like2Buy (**https://jmlinks.com/32w**), that can cross-connect your account to photos that match your posts. To enable shopping, you can thus a) ask customers to DM you for more info, b) tell them to check "link in bio" via a service like those listed above, and/or c) enable the "Shop" feature for your eCommerce store.

Link in Bio / Link in 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. Use a service like Link Tree (**https://jmlinks.com/45w**) to have a handy index of referenced links.

Add Locations. This is a unique feature of Instagram. When you upload a photo, you can "tag" it to a location such as San Diego or Miami. This improves your chances of appearing in the *Instagram Explore* feature (See: **https://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 users to post more than one photo per post. Some people dislike this feature, while others like it. The easiest way to use it is to access your camera roll and click on "select multiple" to select multiple photos.

Contests and Challenges. Contests and challenges are huge on Instagram. Have a contest, asking your fans to do something (and enter to win something). Or create a silly "challenge" that challenges them to do something just for bragging rights. Check out the hashtags #*challenge* and #*contest* to view what other brands are doing.

Instagram Live. As on Facebook and YouTube, you can "go live" on Instagram. Brainstorm fun, live events for your customers, and "go live" on Instagram. Learn more at **https://jmlinks.com/45p**.

Manage Multiple Accounts. Once you've set up your own personal Instagram account and that of your company, how can you manage both of 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, such as Hootsuite or Buffer, to manage multiple business accounts. This allows you to post from the desktop and schedule your posts.

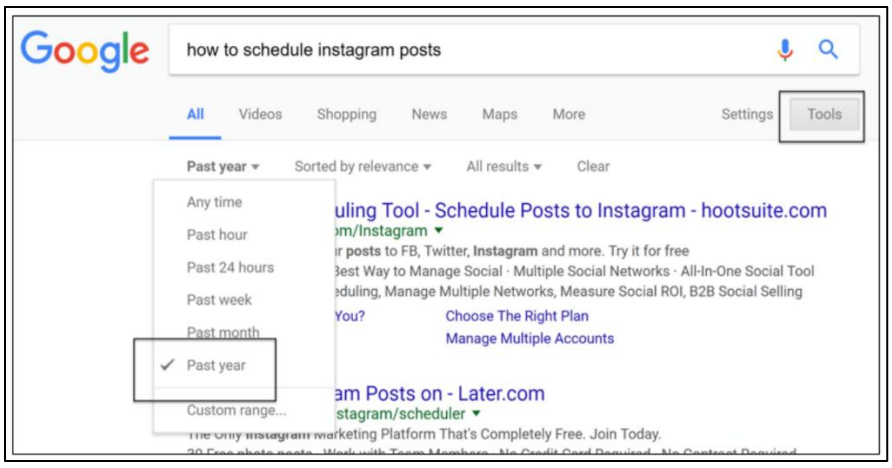
Instagram Help. Yes, Virginia, there is help on Instagram! Visit **https://jmlinks.com/33y**. You can search by keyword for assistance on a wide range of topics. Instagram for business focuses more on advertising issues, but can be found at **https://jmlinks.com/33z**. They also have an excellent Instagram business blog at **https://jmlinks.com/45q**.

Check out my continually updated post, "Instagram Technical Tips," at **https://jmlinks.com/55d,** which I use in my Stanford Continuing Studies class on social media marketing. The technical tips just keep coming!

Know the 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." 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" to get recent, up-to-date answers. Here's a screenshot:



You can also use ChatGPT or YouTube to find the answer.

» MASTER INSTAGRAM SHOPPING

Let's talk about shopping. Who doesn't love to shop? Instagram is highly visual and ideal for B2C consumer brands that want to encourage shopping.

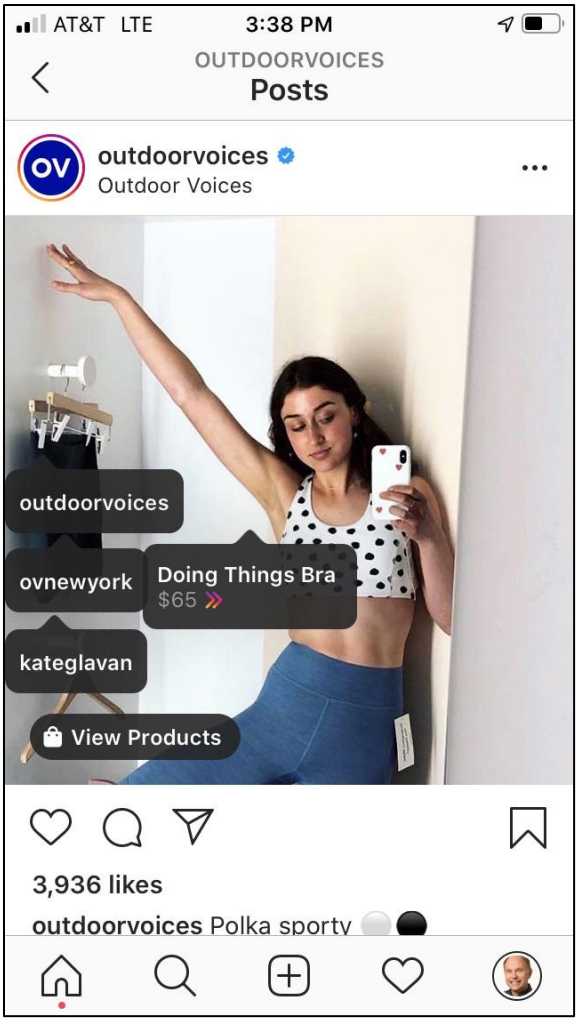
A Simple Strategy

The most straightforward strategy is to link your content to your products or services proactively. Your content can encourage excitement and then subtly (or not so subtly) explain that it's "for sale." Here are the three ways that you can enable a shopping experience for your customers via Instagram:

1. **Mention Shopping Opportunities**. A small company or brand might simply mention that customers can "DM" (direct message) them to inquire about purchasing a product or service in a post. Some companies create unique, branded hashtags so users can post and inquire about products or services via these hashtags. By having a business account, you can also enable the "contact" buttons, such as email or messaging. As you post, remind customers that what

you're posting is "for sale," and they can DM you for more info or click the "email" button, etc.

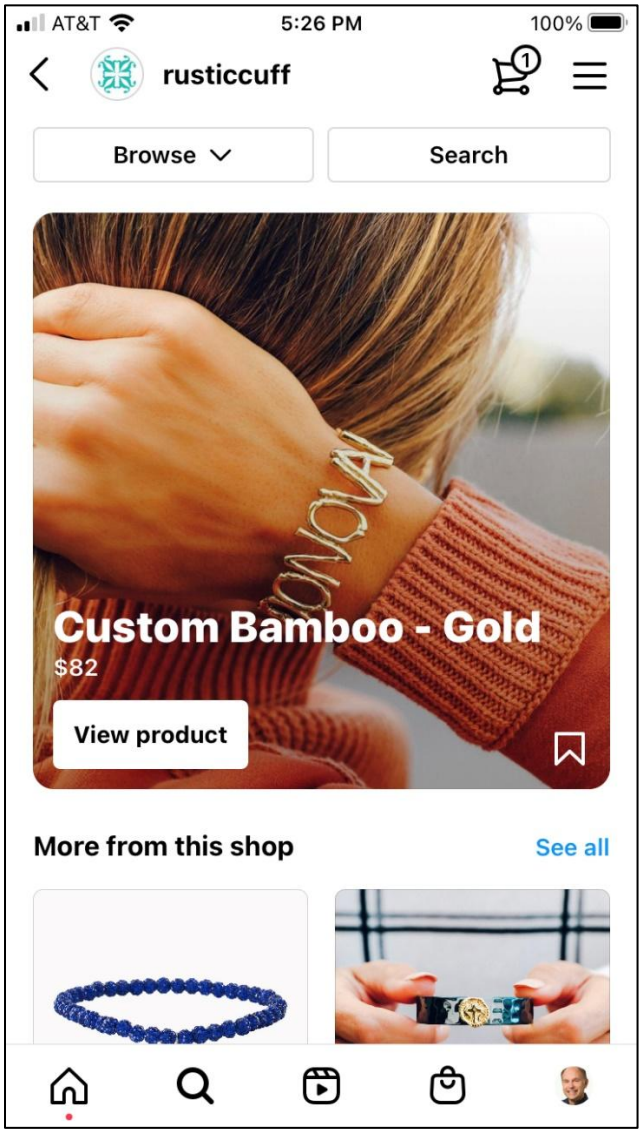
2. **Use a Link Service**. You can mention "link in bio" often in your posts, thus directing users to your website or, to be more specific, to a link service like Curalate, Like2Buy, or LinkTree that can match your posts on a one-to-one basis to items in your e-commerce store.
3. **Enable Instagram Shopping and Tag Products**. If you have an e-commerce store on your website, you can activate the Instagram shopping feature. This is the most direct way to enable e-commerce via Instagram. Note that, if enabled, this allows you to "tag a product" via Instagram. Here's a screenshot of a tagged product post by *@outdoorvoices*:



Users can click on "View products" to shop or click directly on the "Doing Things Bra" and purchase it for $65. Learn more about tagging products at **https://jmlinks.com/53p**.

Enable Instagram Shopping

Returning to the Rustic Cuff Instagram account, notice the "shop" button. Note: you will see this button only on the mobile version, not the desktop. It's the little "view shop" icon. This new "Instagram Shop" feature is a direct connection to an e-commerce store. Learn more at **https://jmlinks.com/45e**. Here's a screenshot of what you see after you click the "shop" icon on Rustic Cuff's Instagram page:



This allows a user to toggle between Rustic Cuff posts that they like and the e-commerce store, and thus purchase items via a direct link from Instagram. Instagram has become a kind of glossy photo magazine for the fashion set; it's an excellent platform for consumer clothing, jewelry, make-up, and accessory brands. Shopping just takes it to the next level.

Within the rubric of shopping on Instagram, let's pause for a moment and investigate the options. Instagram is consolidating all shops into "Checkout with Facebook and Instagram," meaning that all transactions will occur natively on Instagram's platform. (Learn more at **https://jmlinks.com/74r**). Below are some Instagram accounts with active shops; check them out to see how shops work on Instagram. (Previously, Instagram allowed non-native shops (i.e., shops that consummated the sale off the platform), but this has been discontinued.) You'll need to use the Instagram app on your phone (not the desktop) to see the shopping options as follows:

Shopping

Examples: *@fentybeauty* (**https://www.instagram.com/fentybeauty**) and *@stickyroosterbrand* (**https://www.instagram.com/stickyroosterbrand**).

Click on the account, then into their shop, click on a product, and you remain inside of the Instagram app, where you "consummate" the purchase.

Tagged Products

Examples: *@target* (**https://www.instagram.com/target/** and *@stickyroosterbrand* (**https://www.instagram.com/stickyroosterbrand**).

Click into the account, look for posts with the "shopping bag" icon in the top right (or click into product posts). Click again on the post, and you should see small text pop-ups. Click on these, and you will be taken to their store (either native or non-native).

Identify a few brands that have Instagram shops and play around with how they integrate their main Instagram feed with shops and products to purchase, including "tagging" products in their posts. Brainstorm your customer journey from awareness of your products to engagement and purchase on an Instagram store. If you sell a service, the same rules apply, but you use a "link in bio" to direct users from Instagram to a lead generation page.

» 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 that you distinguish among and identify three distinct types of companies. That is, you need to:

1. Find companies *in your niche or industry,* such as competitors.
2. Find companies *in similar niches or industries* (e.g., B2B companies if your B2B, B2G companies if your B2G, etc.)
3. 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 **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), 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 identified above.

Finding Companies on Instagram

To identify companies on Instagram, start with your keywords and social media themes. 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, bridal.*

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:

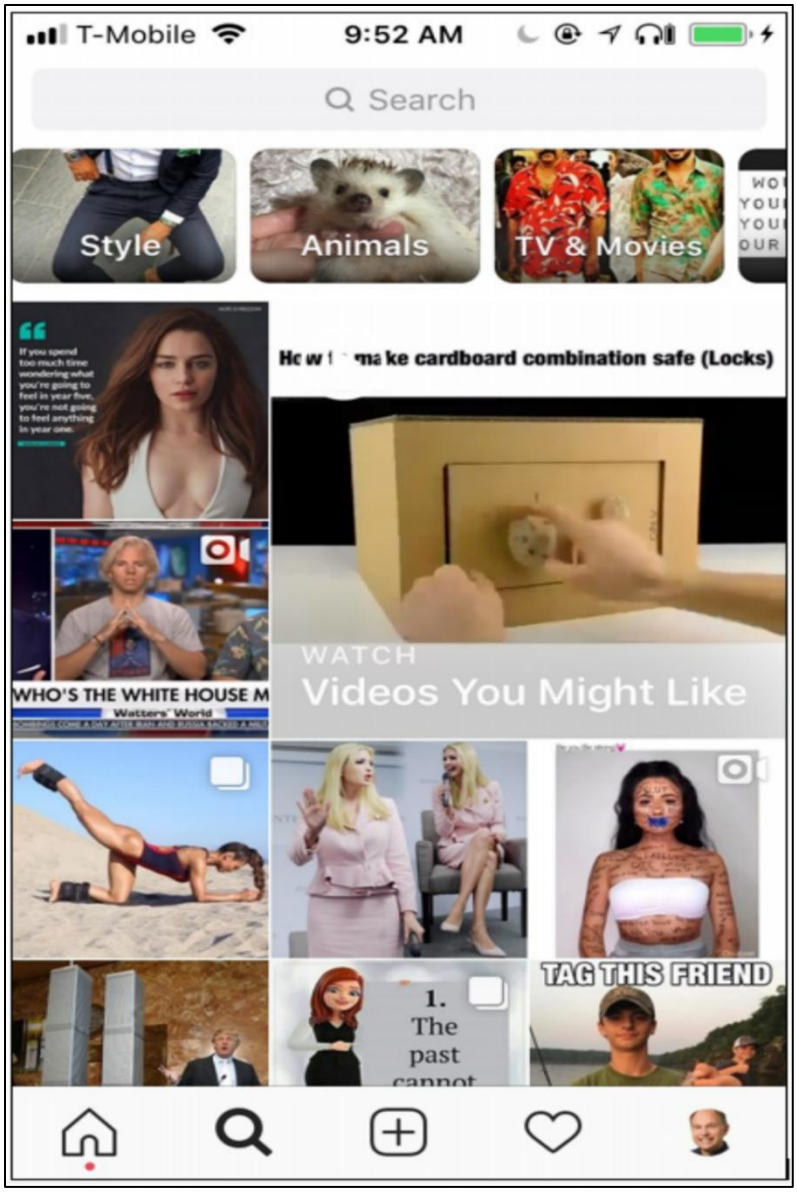
Method #1: Instagram Search. Go to Instagram, either on the desktop or on your phone. Type your keywords into the search box. Then, look at the posts that show, and click up to the account holders. Alternatively, examine the comments and likes, and click over to those people who are interacting with the posts. Create a list of accounts that align with 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 **https://jmlinks.com/28c**. Next, scroll down the list, and Google will identify accounts on Instagram that have those keywords.

Method #3. ChatGPT. Ask ChatGPT to identify competitors, companies to emulate, and other brands (influencers, superfans) that are similar to your brand or that might inspire content ideas.

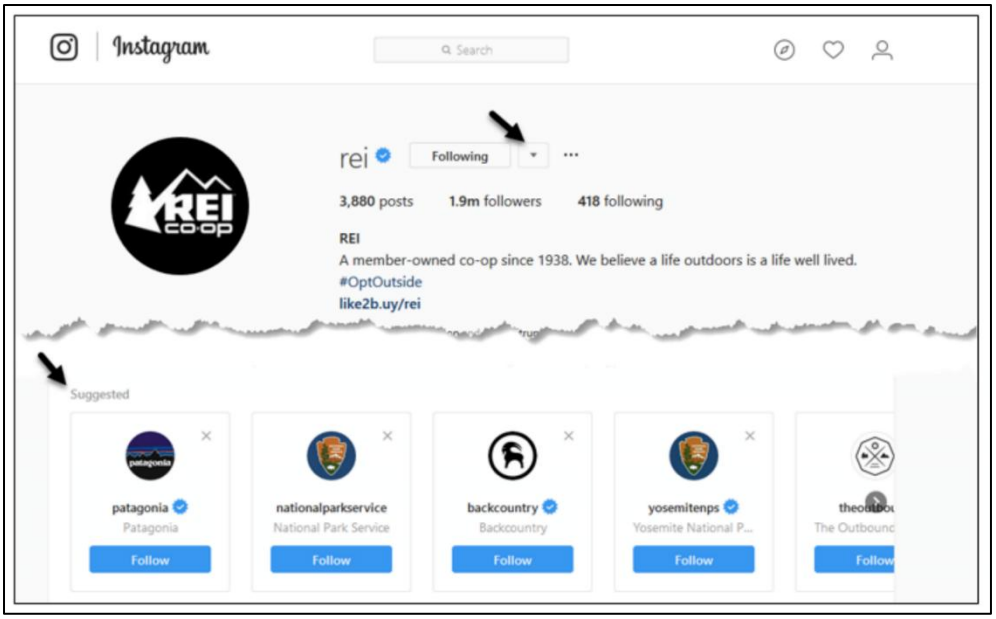
Method #4: Use a Geotag. Type a city name, such as *Tulsa* (**https://jmlinks.com/28g**), into the Instagram search box. This is a good way to see posts across a wide range of industries and topics, so you don't get "boxed in" to seeing just posts in your industry.

Method #5: **Instagram Explore.** Instagram Explore works best if you first configure your personal Instagram account for a few weeks and ensure you follow competitors and others in your industry. Then, open your Instagram app and click the "Magnifying Glass" icon at 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." Across the top, you can also swipe by category for suggestions. Here's a screenshot:



If you click on "Style," you'll see posts on that topic and can then click up to follow a person or brand that might be relevant for your marketing research. You can also access *Instagram Explore* on the desktop or at **https://www.instagram.com/explore/**.

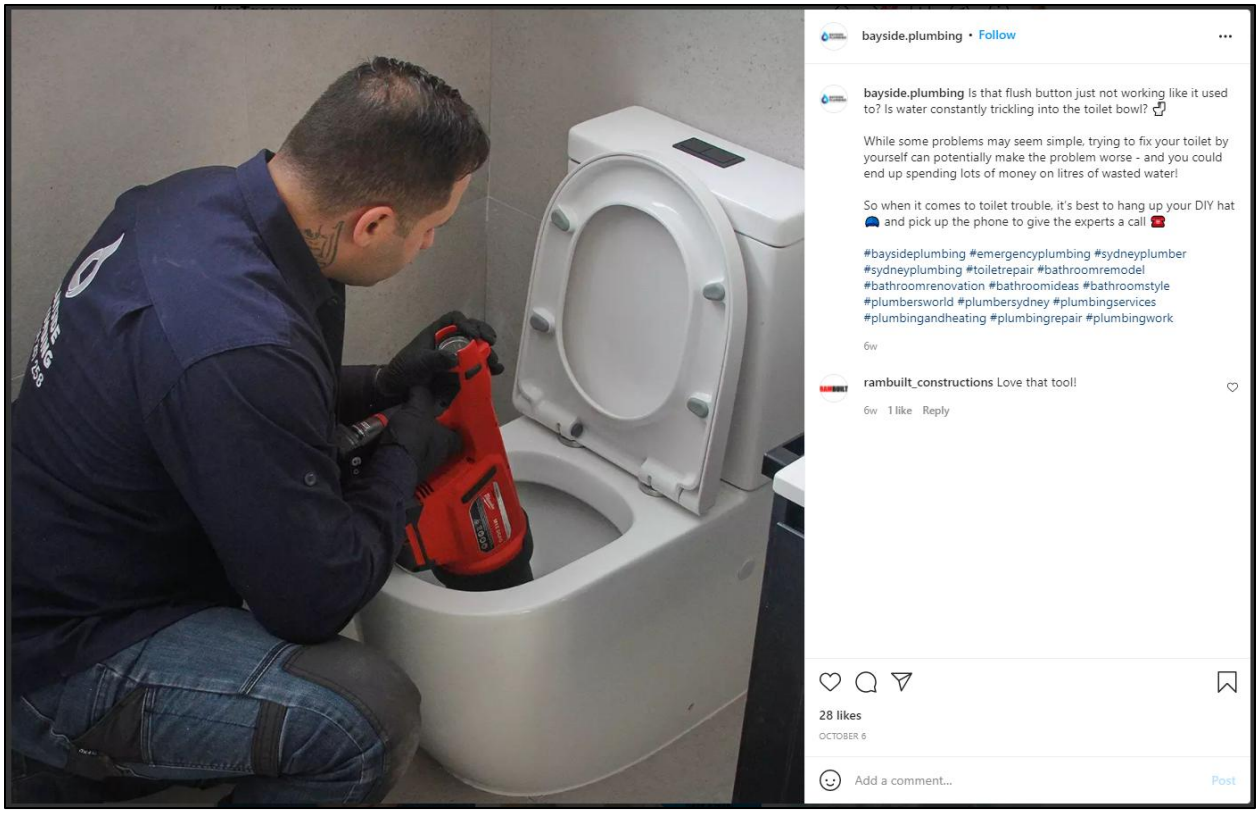
Method #5. Explore Account Suggestions. You can also find one brand you like and then click on the downward arrow to the right of "message" in the app to see "similar" companies. It's easy to miss, so here's a screenshot:



In this way, you can find one brand, such as REI, and then identify similar or competitive brands to follow, like Patagonia, the National Park Service, and Backcountry.

Inventory Companies That You Find

For example, if you search Instagram for *toilet repair* (**https://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?

As you identify posts and accounts, take some notes as you and your team discuss what you like and what you don't like about:

Profile Picture. Do you like it? Does it convey the brand image?

Bio. What does the bio say? Does it have a link?

Other Technical Features. Is shopping enabled? Is it native to Instagram, or does it redirect to the vendor's website? Is a branded hashtag in use? Why or why not? Can you message the account owner? Go through the technical features one by one and "reverse engineer" how they are being used.

Followers. How many people follow the account? What type of engagement are you seeing?

Content Strategy. What types of content are being created and why? What is the ratio of "fun" posts to "buy our stuff posts?"

UGC is key on Instagram. Can your company identify and create a unique branded hashtag for your own customers? Would they care enough to post photos tagged in that way? What about having a contest or challenge for the best photos posted to your hashtag? Don't stare at the blank page: inventory and reverse engineer what other companies are doing on Instagram.

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 (**https://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. This post suggests that *@theTacticalPlumber* is having fun with Instagram, not just posting boring content about plumbing.

And yet, it does relate to plumbing, and it does build the company's brand. What types of posts might you create that are fun, playful, and photogenic, yet still 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 align with the brand image that the vendor is trying 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?

> **AI PROMPT.** Take one of your companies-to-emulate. Post its URL into ChatGPT and prompt it: "Looking at this company, can you first identify the structural elements of its brand, such as its brand name, summary, Reels, and Stories (including Story highlights) in one section, and then in another, analyze its content strategy. Please do your analysis in about 500 words that summarizes the brand strategy on Instagram."

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* (**https://jmlinks.com/28f**). This is a British company that offers insurance for vendors in the wedding industry. They have 270 posts, 680 followers, and are following 1,178. Note that they are an insurer (*boring*!), but they are adjacent to a very Instagram-friendly business: weddings (*fun*!).

Their bio says:

> *The specialist independent insurance broker for wedding and event businesses. We cover niche professions. Visit our site for a quote.*

Scroll down through their posts and attempt to "reverse engineer" what they've posted and why. You'll see many posts with quotations that speak to the fear that photography or catering equipment might get stolen or something might go terribly wrong, hence the need for business insurance. But also take a look at how they use hashtags such as *#WeddingWednesday,* which reaches not just their B2B customers but also people actually planning weddings who might be interested in insuring the big event (what if the groom gets cold feet?). Notice the use of single images, carousel images, and even videos. Here's a post that is a collaboration with a vendor they insure, Luxury Classic Jaguars:

In terms of posting, they use fun images, incorporate hashtags and emojis, include "shout-outs" to their partners, and encourage cross-posting. 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 **TO-DO**, download and complete the **Instagram Research Worksheet**. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), and click on the link to the "Instagram Research Worksheet."

Pay the most attention to the **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 creating an editorial calendar for all your social media posts. For Instagram, this involves planning out the types of photos or videos you will shoot, when, where, and how. Like any good party, there should be a

lot of systematic planning for the food and entertainment that need to be produced regularly. It just looks easy, but that's an illusion.

» VIDEO: INSTAGRAM STORIES, VIDEOS, AND REELS

Instagram, like all the major platforms, is strongly encouraging the move to video. It's a Brave New World of vertical video, clearly hoping to leapfrog YouTube as a major video platform. You can upload videos directly from your phone, or you can pre-edit them in vertical format and upload them via your PC. Learn more at **https://jmlinks.com/45s**. Note that if you're doing vertical video, you can (and should) cross-post it to a) Facebook Reels, b) YouTube Shorts, and c) TikTok.

Instagram Stories, in contrast to Reels, are short pictures or videos you upload to your "story" as a brand. Stories are essentially a "day in the life" of an individual or brand, told in photo and video format. "Stories" is a direct competitor to **Snapchat** (**https://www.snapchat.com/**). Snapchat, of course, invented many of the aspects "stolen" by Instagram, such as stories or filters, and so far, it looks like Instagram is going to win out. And don't forget you can upload videos directly to Instagram as a post from your phone.

Instagram is very video-friendly, and the company clearly sees video as its future, so stay tuned. Reels is Instagram's copycat of TikTok. Users can upload short, funny videos, as can brands.

IT'S INSTAGRAM AND REELS, NOT INSTAGRAM OR REELS

Nonetheless, I'd caution against *either/or* thinking and recommend you do *both/and* thinking. The lion's share of your work will be on Instagram posts of pictures and videos directly to your feed, but you should also investigate Stories and Reels.

Learn more about Reels at **https://jmlinks.com/55e**. Reels is a direct copy of TikTok videos, focusing less on your social media connections and more on trending content. As on TikTok, Reels tend to be short, fun, and snappy. Many reels utilize "trending sounds" that serve as a sort of audio hashtag. Within reels, click on any video and on the lower right for "trending sounds." Trends are key to reels, as the algorithm pays close attention to which videos a user watches, likes, and comments on. Thus, people who love cat videos see more cat reels. People who love dog videos tend to watch more dog videos, and so forth. Reels works, as does TikTok, on a "recommendation engine" algorithm, rather than a traditional social network.

» 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 determined that they're active on Instagram. You've also looked at competitors, similar companies, and brands that "get it" to gain a sense of what you like and dislike about brand marketing on Instagram. You've completed the *Instagram Research Worksheet*. Now download the *Instagram Post*ing and *Instagram Marketing Plan Worksheets*. (For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook)).

Instagram Set Up

The *Instagram Research Worksheet* provides the 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're going to use an Instagram-related link service such as Like2b.uy (**https://jmlinks.com/32w**) or Olapic's Tapshop platform at **https://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 multiple people are uploading photos and videos, ensure that each person enables it on their phone. Consider using a third-party app, such as Hootsuite, to manage and schedule your posts.

Instagram Posting Strategy

What and how should you post? First and foremost, figure out if you are a *fun* company in a *fun/photogenic* industry, where people will want to share photos of themselves directly using your product or service, or if 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 business isn't fun, 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 adjacent to something fun*, 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 the reality of how fun and photogenic your products or services truly are.

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 arise when customers use your product or service in a photogenic way, such as "Kodak Moments" like those used to have in Disneyland. A museum store might host a contest among its customers to share a fun photo of mom or grandma with the kids while they're buying something in the store. What are your "Instagram moments" for your business? Think ahead to identify the best opportunities for Instagram buzz, and write them down in your posting strategy worksheet.

AI PROMPT. Explain to ChatGPT your brand and target buyers. Then ask it for content strategies, such as "Now, give me ten content ideas that I can deploy quickly and easily myself, especially ones that are likely to have high engagement."

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!

The steps are:

1. **Create Engaging Content.** You must create content that engages your customers, sparks their curiosity, and empowers their imagination.
2. **Promote Your Instagram Content.** Content by itself is insufficient. You need to promote your content to customers through every trick of the trade: from

real-world to social, across social platforms, and from one social platform to another, such as from X to Instagram, through organic means like hashtags, and even advertising.

3. **Have a Clear Call To Action (CTA).** A strong brand encourages customers to take action. That can be an obvious CTA, such as a shopping post with tagged items or a more subtle CTA, like "link in bio." Still, regardless, you, as the marketer, need to encourage customers to take the final step: buying your products or services, either on or off 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 followers or just a few. 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. Ask your customers to follow you on Instagram at the point of real contact. A museum gift shop, for example, can install placards at checkout 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 to explore collaborative Instagram marketing opportunities. If you're a wedding photographer, reach out to the wedding florist, the wedding venue, the cake maker, the priest, the rabbi, or another officiant at the wedding… ask them to "collab" with you and/or give you a "shout out," and reciprocate. Tag collaborators, customers, and superfans by using the @ sign in your posts.

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 interests them, so deploy hashtags that align with their interests and ensure that the content they learn is "sticky" so that they follow your account. Use RiteTag (**https://ritetag.com/**)) to find trending hashtags on X and Instagram that are relevant to your brand, and include them in your posts. In addition, identify one or more "branded" 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. Ensure that your website links to your Instagram account easily, and cross-promote from your other social media accounts (e.g., X) 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 **https://jmlinks.com/28r** for more information). So don't be spammy! More tips on being interactive with your fans –

Follow Relevant People. "Follow for follow" still works on Instagram, so identify and follow industry leaders, the followers of your competitors, and so on. This means that if you follow them, they will likely follow you back. Warning: do not overdo this, as there is a daily cap of approximately 300 follows and a lifetime cap of 7,000. Don't spam!

@Tag People. Mention or "tag" 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. **Tag** your fans and superfans as well.

Like and Comment on the Posts of Others. Look at your users and their friends, and like their posts. Ditto for comments. Comment on what others are doing on Instagram.

Reshare Your Users' 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

to someone who posts a photo by email, have them email it to you, post it to your account, and include their @handle in the 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 is already following you and interact with their comments on 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 e-commerce store. Since Facebook owns Instagram, you manage an Instagram ad through your Facebook account. You need a Facebook Page for your business and must connect that Page to your Instagram account to advertise. You can read the official help file at **https://jmlinks.com/28w**.

Instagram Contests and Challenges

Among the most important Instagram promotion strategies are **contests** and **challenges**. 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. Here's a screenshot of a Touro Luggage contest:

It uses the hashtags *#contest* and *#giveaway* in the post itself as well as the branded hashtag *#travelinstyle*. It requires users to like, share, and comment on this post. Note – not all of this is in compliance with Instagram's official rules. Contests, in other words, require users to do things to be entered to win something. Money, products, or services get exchanged.

Challenges, in contrast, are more spontaneous and typically do not involve financial considerations. Users instead get "bragging rights" for succeeding at the challenge. Search Instagram for hashtags *#contest* and *#challenge* to get ideas for your own contests or challenges. Vendors such as Gleam.io help manage Instagram contests (**https://jmlinks.com/28u**). Just Google "Instagram Contests" or "Instagram Challenges," and you can easily find additional helpful vendors or apps. Read the official Instagram restrictions on these types of promotions at **https://jmlinks.com/28v**.

AI PROMPT. Ask ChatGPT for "challenge" or "contest" ideas that you might implement on your Instagram account.

» WORK WITH INSTAGRAM INFLUENCERS

Instagram is probably the most important social media network for so-called influencers these days, although they are also prominent on YouTube and TikTok. What's an influencer?

An influencer is a person who has a substantial social media following and is willing to promote your product or service, typically for a fee.

Here's where it gets tricky. You want to distinguish among:

Fans and Superfans. These are people who truly use and like your product or service and are active on Instagram, and might promote you "for free" because they genuinely love it.

Paid Promotions / Contests / Challenges. This is using giveaways, contests, challenges, or other tactics to encourage your fans and superfans to promote you. You either pay them, or they receive some compensation in exchange for spreading your message.

Influencers. This term has come to refer to individuals who have a substantial following on Instagram and are willing to promote your product or service for a fee. Ensure that they are relevant to your brand; it's not just about quantity - after all, it's about quality and relevance.

It is also possible that people with a significant following might be willing to collaborate with you and your brand in exchange for free products or simply because they genuinely love your brand, products, and/or services. A hotel chain, for example, might comp a guest to stay at the hotel and in exchange, expect photos, videos, and shout-outs about the brand. Or a restaurant might offer discounts to its patrons for similar behavior. So, you'll have some "influencers" who might promote you for free because they really love you, some who want free stuff, and still others who want money.

FTC regulations require individuals who receive free products and/or compensation to disclose a paid relationship in their posts, but this regulation appears to be widely

ignored. Instagram also requires the influencer ("paid") posts to be identified with the tag "Paid partnership with" your company. Check out posts fulfilling this requirement at **https://jmlinks.com/46g**.

To find influencers, examine your branded hashtags and look for fans and superfans who are already actively engaged. Follow them back and look at how many followers they have. Reach out to them with offers of free products and/or financial incentives to promote your brand.

Search Instagram by keyword and look for accounts that are relevant. Google "influencer marketing Instagram" and you can easily find companies and services that broker the relationship between influencers and brands on the platform. You can also ask ChatGPT to identify the top ten influencer accounts that would have the most synergy with your brand.

» MEASURE YOUR INSTAGRAM KPIS

Although Instagram does not easily allow links to your website, Instagram marketing can still be measured. Define the KPIs (Key Performance Indicators) that will indicate whether your Instagram marketing efforts are building brand awareness and/or directly driving sales.

Establish some KPIs (Key Performance Indicators), such as:

- **Followers**. Measure your follower count each month. It should go up.
- **Engagement**. Measure, for each post, the quantity and tone of likes, comments, and shares. Which posts get the most engagement? Why or why not? New for 2026 track "shares" of your content by followers to their followers.
- **Action**. You're not in this for your health. Is Instagram –
    - **Building your brand**? Positively increasing your brand awareness? If so, why? If not, why not, and what can you do to address the issue?
    - **Leading to sales** actions such as completed feedback/inquiry forms or purchases at an e-commerce website? For some brands (e.g., Airbnb, Rusticcuff), Instagram CAN lead to real sales, but for others, this isn't a realistic objective.

Your Instagram strategy – working *backward* – should progress from a sale/sales lead to improved brand awareness, to a fun, photogenic post by you or a fan, and ultimately 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, such as either better brand awareness or an actual sale (or both), and work backward.

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? Interact with your users and others on Instagram by liking, commenting on, and sharing their posts. Tag people in your photos and videos. Follow individuals, as the "follow for follow" vibe is still powerful on Instagram. Measure whether these outreach efforts are resonating or not, and why.

Finally, on an ongoing, monthly basis, measure your Instagram performance in relation to your KPIs and record the results, just as you should for other social media networks like Facebook, LinkedIn, or X. Is your fan base growing? Is your engagement growing? Are you seeing improvements in your brand equity? Are you seeing any actual sales performance from your social media efforts? How can you improve?

Measure 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 and ultimately helping you to sell more stuff.

»» CHECKLIST: INSTAGRAM ACTION ITEMS

Test your knowledge of Instagram! Take the *Instagram marketing quiz* at **https://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 **content** engages them, and why? What type of interactive and/or UGC content do you see?
  - ❑ Whether **your competitors** are on Instagram. If so, what is their Instagram posting strategy, and does it appear to be effective, as measured by the number of 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.

❑ **Contact Info.** Make sure that your contact information is included in your Business account. If possible, sign up for the shop feature.

❑ **Posts.** Begin posting photos and/or videos of your business that fit to the Instagram culture of friends, family, fun, photos, and fake.

❑ **Instagram Stories and/or Reels**. If possible, create a daily Instagram story about your brand. Save stories as "highlights" so that they show under your profile. Once you have 10,000 followers, you can also embed links.

❑ **Instagram Shopping.** If applicable, set up the Shop feature for your e-commerce store. If you're a major brand, consider setting up an Instagram "native" shop.

❑ **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?" Leverage your customers' "showoffiness" to support your brand, perhaps through a branded hashtag like *#optoutside*. Then brainstorm –

❑ **Photos** to take of your business, products, and/or services that "fit" with Instagram.

❑ **Videos, Stories,** and **Reels** that "fit" your brand narrative.

❑ **UGC** or "User Generated Content." How can you encourage your fans and customers not only to interact with the content you produce but also to create content themselves that helps build your brand? Would contests or challenges work for you? What about a branded hashtag?

❑ **Interactive Content.** Be interactive on Instagram. Follow your fans back, and follow new people to get their attention. Like and comment on what your fans are saying. Make your brand interactive.

❑ **Promote** your Instagram business profile through strategies like *#hashtags*, follow for follow, cross-connections to other digital properties like your website, X, 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 e-commerce store.

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

»» DELIVERABLE: AN INSTAGRAM MARKETING PLAN

Your **DELIVERABLE** has arrived. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), 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.

9
YOUTUBE

YouTube offers a two-for-one punch to your social media marketing. First, video can be the **actual content**, the "stuff" that's being posted and consumed on X, Reels, TikTok, Facebook, LinkedIn, etc. People watch, like, comment on, and share videos, which are one of the most popular types of content on the Internet. Second, as a **social media platform** in its own right, YouTube works much like Facebook or X. 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. If you master video, you're on your way to mastering YouTube. And if you master YouTube, - by definition – you are mastering video.

In this Chapter, you'll learn the basics of what makes a good video for any platform. As for YouTube, you'll see parallels 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"). You'll learn that video brings four different marketing mechanisms in its role as content. First, video can "support" your marketing efforts as a type of content that you share on YouTube, Facebook, Instagram, etc. Second, video can be "SEO'd," meaning you can optimize your videos to appear at the top of Google, YouTube, and (new for 2026) recommendation algorithms that push your content to new viewers on TikTok, Reels, and YouTube Shorts. Third, video can "go viral" and "be shared," as users like, comment, and share video content across platforms. And, fourth, video can be the foundation of a "subscription" business in which users subscribe to your YouTube channel and perhaps pay for enhanced content or purchase "swag" from your eCommerce store. Finally, YouTube offers robust advertising opportunities, which are managed via Google Ads.

Let's get started!

TO-DO LIST:

- » Get What's So Great about Video
- » Explore How YouTube Works
- » Inventory Companies on YouTube

» Understand the Four Promotional Uses of Video

» Tell Stories through Video

» Set up Your Channel and Upload Videos

» Advertise on YouTube

» Explore Video on Facebook, Instagram, LinkedIn, and TikTok

» Measure your Results

»» Checklist: YouTube Action Items

»» Deliverable: A YouTube Marketing Plan

» GET WHAT'S SO GREAT ABOUT VIDEO

Video is the fastest-growing form of content on the Internet, and video is the most viral type of content. People love video! But why? In his prescient 1964 book *Understanding Media*, Marshall McLuhan argued that "the medium is the message." McLuhan was one of the first to realize that people would respond emotionally to video. Were he alive today, the McLuhan would not be surprised at the popularity of "cat videos" on the Internet, the fact that trends like the "Harlem Shake" or "Ice Bucket Challenge" can "go viral" by leveraging both the power of video and the power of influencers, nor the power of video to create political controversy over events at the US border, the relationship between police and immigrant communities, the 2024 election, or other powerful political images that seemingly sweep across the culture day in and day out. More recently, authors such as Richard Brodie and Susan Blackmore have argued that the Internet accelerates the spread of "memes" or "idea viruses," and that video plays a crucial role in how ideas disseminate across culture.

For marketers and business owners, video brings together two key features that exist almost nowhere else in social media:

1. the ability to **leverage emotions** to persuade potential customers to like your brand and buy your stuff, and
2. an increased likelihood of **one user sharing via social media with** others.

Video, by its very nature, is also an ideal medium for "showing" rather than "telling," so it plays well in the "how to" space as, for example, in popular videos like "how to tie a tie," or "how to stop your puppy from biting," with 82 million views and 9.4 million views on YouTube, respectively. And for better or worse, video is "easy" to understand

vs. reading, which is "hard." Truth, reason, objectivity, and so on – these are not necessarily part of what makes a video popular.

People prefer emotion to reason, showing to telling, and viewing to reading. Video hits all three of these trends. Another trend is the movement towards "recommendation engines" in the algorithm. TikTok, as well as YouTube, Instagram, X, Facebook, and other video-heavy platforms, increasingly *recommend* videos to users, even if those users do not "follow" the video creator. Cat people get more suggestions of cat videos, dog people get more dog videos, and so forth. Trends can be more important for the success of your video content than the actual subscribers to your channel on YouTube or followers of your account on TikTok. Indeed, the launch of "YouTube Shorts," a copycat of TikTok, speaks to how YouTube aims to evolve from being a social media platform into a recommendation engine, or perhaps a hybrid of the best of both.

Video is an incredible tool in your marketing toolbox. Imagine videos about your brand, product, or service that touch on emotions, spur social sharing, explain how to use your product (and its benefits), and are so easy to consume as content that the user needs to merely sit back, relax, and absorb your marketing message. What's not to like about video?

VIDEO IS EASY TO CONSUME AND HARD TO PRODUCE

Production, that's what not to like. Producing video, compared to still photos or text posts, is more challenging. It requires knowledge of visual storytelling, as well as production techniques such as scripting, camera work, sound, and editing. Even a short YouTube video can be challenging to produce. With some effort and some tools, however, it's increasingly easy to create videos. So don't be intimidated! Instead, embrace and enjoy the video revolution in marketing.

» EXPLORE HOW YOUTUBE WORKS

Video and YouTube are among the most dramatic, most viral components of the Internet. Who hasn't tried the "I tried X for Ten Days" challenge, as for example, "I tried the egg diet for 10 days," or "I tried the Okra diet for ten days?" Who didn't gnash their teeth at the "Kiss Cam Coldplay" controversy? Who hasn't regretted the "earworm" when they have watched "Baby Shark" with their four-year-old niece, or replayed "Despacito" as one of its over eight million views? Who hasn't watched "Dear 16-Year-Old Me" or "Dear Future Mom"? (Check out the hashtag #challenge on

YouTube at **https://www.youtube.com/hashtag/challenge** to see the latest crazes.) Who isn't aware of "haul" videos and the popular hashtag *#tryonhaul* with 149,000 videos and 36,000 channels chiming in on that trend? And who hasn't fallen into the trap of assuming all YouTube is silly cat videos, Beyoncé and Jay-Z 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 four basic ways that 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 true on your website, on YouTube, on Facebook, and even on LinkedIn or X).
2. **Video as a discovery mechanism via SEO** (Search Engine Optimization), helping you promote your company, products, or services via YouTube and Google search. New and rising: the trend towards "recommendation engines" not just on YouTube but TikTok, and Reels, that suggest your video to new viewers.
3. **Video as a share / viral promotion tactic**, because people love and share provocative videos, not just on YouTube but via all social media networks like Facebook, X, LinkedIn, or Pinterest.
4. **Video as a Subscription Service:** you become a de facto "TV channel," and people "subscribe" to your channel because they want to learn about a topic, watch you pontificate in serious or humorous ways about trends, or laugh/engage with you "as if" you / your channel were a TV show. In this model, you make money with "product placements," "internal ads," and "monetization" via YouTube's ad platform.

We should also mention **#5** – video as an *advertising* medium. YouTube presents unique advertising opportunities, and "video ads" are now common on Facebook, X, and LinkedIn. And **#6** – video across platforms from YouTube to Facebook, Instagram, and now TikTok and beyond.

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 **https://jmlinks.com/1q**). If you're familiar with Facebook and X, you'll see many similarities right out of the gate:

- Individuals (or brands) have an "account" or "**channel**" on YouTube, set up by registering with an email address and using their Google account to manage their account.
- Individuals (or brands) 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. 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. A unique feature on YouTube is the "bell," located to the right of the "subscribe" button; subscribed users can click it to increase the likelihood of notifications.
- Individuals can **thumbs up / thumbs down videos** (akin to "like" on Facebook of a post), comment, and share the videos via other social media, as well as create playlists of videos on YouTube.
- Companies can create **brand channels** on YouTube. They can also post alerts and announcements visible to their fans, including via hashtags, to engage with topics important to the YouTube community promptly.
- **Widescreen or Vertical** – videos can exist in two formats: the older "traditional" horizontal format or the newer "**shorts**" vertical format, optimized for the phone. The latter is a complete rip-off of TikTok and, like Reels on Instagram, attempts to capitalize on short, funny videos that "go viral" via the "recommendation engine" of the algorithm. Learn more about YouTube shorts at **https://jmlinks.com/57m**.

Like TikTok, Instagram, or YouTube, creating a Channel is easy and open: anyone can quickly set up a channel. Like the other platforms, YouTube does not clearly distinguish between an individual's channel or account and that of a company. And like X or Instagram, YouTube really does not authenticate users. It's super easy to set up a Channel and post videos as either an individual or a company.

For assistance on how to set up a company YouTube channel, visit **https://jmlinks.com/1r**. Your first step is to set up a YouTube account, either as an individual or a brand, and then start searching for, watching, and interacting with videos. What videos pique your interest? What videos seem relevant to your target customers?

Which brands or individuals are relevant to your company already on YouTube, and what type of video content are they producing that's getting traction?

» INVENTORY COMPANIES ON YOUTUBE

After you've signed up for YouTube, your mission is to identify competitors on YouTube as well as brands to emulate to make an inventory of your likes and dislikes when it comes to YouTube as a channel for marketing. I'll focus mainly on how to use YouTube as a brand, but let's summarize the four types of YouTubers:

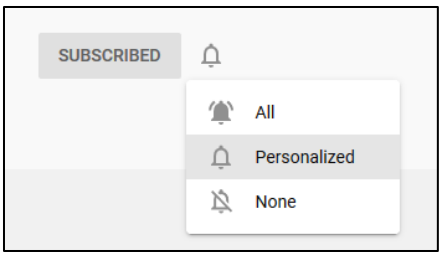
1. **Ordinary People**. Most people do not post videos; they only consume content. They are "content consumers" and not "content producers." These are your target audiences as a marketer. Like YouTube, YouTube reaches nearly everyone on the planet. "Riches are in the niches," so don't be discouraged by the high-profile pop culture elements on YouTube. There are many fantastic niche users and niche usages!
2. **Amateur Content Creators**. These are people who create and upload videos about their lives, likes, habits, or other aspects of their lives, but whose goal isn't to make money or go viral. They are merely using YouTube like Facebook, TikTok, or Instagram to upload and share content about their lives. Note that an individual can be both a user on YouTube and a content creator, just as they can be on X or Facebook.
3. **Professional Content Creators or Influencers**. These are individuals who really function as brands. An example would be PewDiePie, who has over 110 million subscribers on YouTube (**https://jmlinks.com/44d**). The most famous example is "Mr. Beast" (*@MrBeast*), who posts outrageous and funny videos on his Channel, which has over 446 million subscribers. Think of this type as akin to "Oprah" on YouTube, where a single individual is a brand, and product tie-ins and advertising generate revenue. Patreon (**https://www.patreon.com/**), YouTube subscriptions, and selling "merch" are new ways for YouTube creators to make money from their videos. You can even find "influencers" eager to accept money in exchange for their "honest" promotion of your product or service.
4. **Brands**. These are companies on YouTube as opposed to individuals who are uploading content and have a marketing agenda of either a) supporting their other social media channels with video content, b) ranking on Google and/or YouTube search, and/or c) getting shares by users or even going viral with their brand message.

As you get started with YouTube, determine whether your business is best served by a brand Channel or an individual Channel (such as the company CEO or lead celebrity), or perhaps both. Perhaps working with influencers would yield a higher ROI, or possibly using YouTube as an advertising venue would be the best approach. Regardless, as marketers, realize that you are producing video for the marketing purpose of building your brand and/or selling more stuff, either directly or indirectly. You're not producing video for video's sake any more than you might be creating art for art's sake. We're talking about video as *a marketing tool, not as an art form*.

How to Browse YouTube for Videos and Channels

To get started, explore what individuals or brands represent competitors, companies to emulate, or YouTube uses that you can see might advance your marketing agenda. How do you find Channels and videos?

One obvious way to narrow down your list of companies to follow is to visit their websites and look for a link from their site to their YouTube channel. A big brand like REI, Target, or Geico, for example, will usually have the YouTube icon somewhere on their website, often in the top right corner or at the bottom of the footer. Sign in to your personal YouTube account, click on the link to YouTube, and then once you land on their channel, click the red "subscribe" button. Click the "bell" to ensure you receive notifications. Here's a screenshot:



A second way to find companies to subscribe to is to **browse YouTube**. When you are logged in to your YouTube account, click on "Browse channels" located on the left-hand side of the screen or in the middle of the screen. This is a bit confusing because once you are an active YouTube user, YouTube hides some of these links, so here are some direct links to click when you are logged in to your YouTube account:

Browse Channels at **https://jmlinks.com/44f**.

YouTube Live at **https://jmlinks.com/44g** as well as at **https://www.youtube.com/@live**.

YouTube Shorts at **https://www.youtube.com/shorts**.

Channels are especially interesting. In 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 under "Subscriptions."

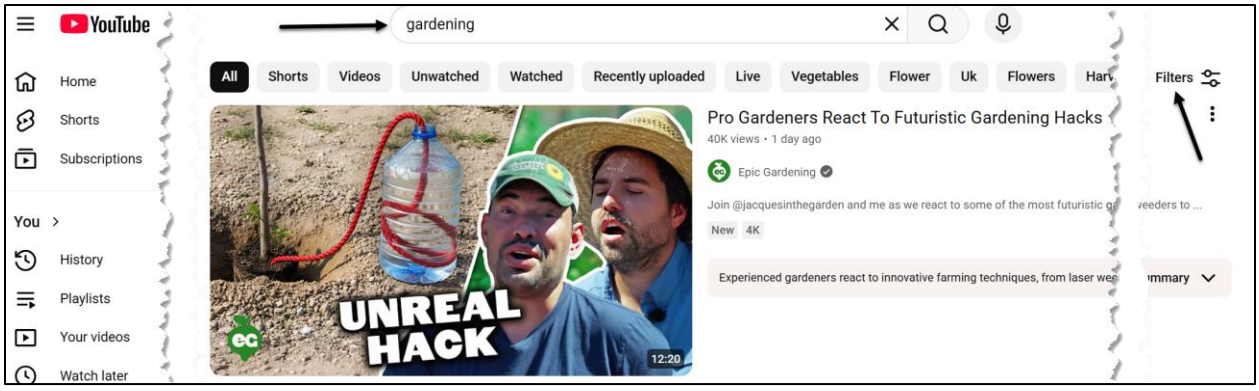
After you subscribe, when a Channel posts a new video, it will appear in your "news feed" under "recommended" or directly under the Channel itself. In this way, YouTube is similar to Facebook or X in that once someone establishes a social media connection, the news feed of one user pushes content when the timeline of the other has something new. As a marketer, you want to drive folks to subscribe to your channel and to hit the "bell" so that they receive your notifications.

AI PROMPT. Since ChatGPT knows your brand and target audience by now, prompt it as follows: "Knowing our marketing objectives, please identify the five best similar brands for us to follow on YouTube. These are highly relevant companies, influencers, and others who are utilizing YouTube effectively as a marketing platform. For each, identify the URL of their YouTube channel and write a summary of two sentences."

How to Search YouTube

Most of the action on YouTube actually occurs at the level of the video, rather than the channel. By this, I mean that most high video counts, sharing, and even videos discovered via search occur through individual videos, rather than channels. You need to be a good searcher to understand YouTube!

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 *gardening* to find YouTube videos on *gardening*. Here's a screenshot:



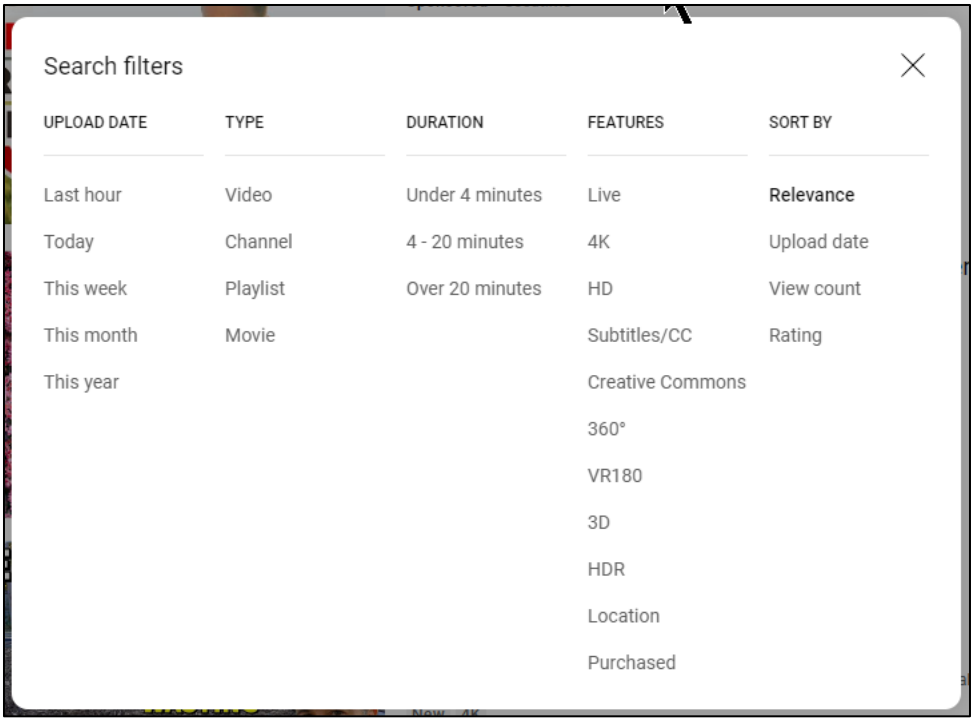
Like the Google search engine, YouTube will return a list of the most relevant videos. Click on a video to watch it, and then click "up" to the channel to learn more about the channel that produced it. Notice the "filters" icon on the top right. You can filter videos by various categories, which is very useful as you research what's on YouTube.

Once you find a video and channel of interest, simply click the red "Subscribe" button to subscribe to the channel. Here's a screenshot:

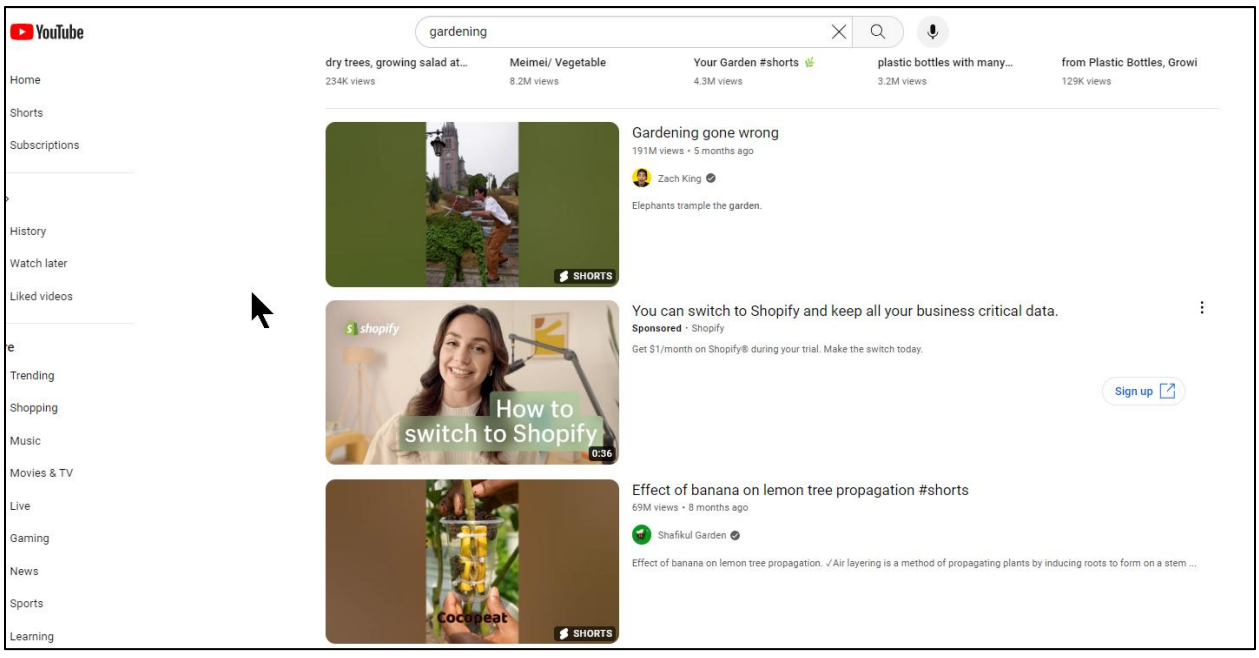
You can also thumb up / thumb down a video, comment on it (using your Google account), and share it. If you click on the share icon below a video, YouTube provides you with all the social icons, as well as a link to "Embed," which offers the HTML code you need to embed a video on your own website or 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 ***Filters***, which opens up a set of parameters by which you can narrow your search. Here's a screenshot:



Click *"Upload date," and the videos will be sorted not by algorithm score but by date uploaded. Click "View Count," and you'll see the most popular videos first, etc.* On the left, you can click a time period, such as "this year," and then add an additional filter, such as "view count," to see the most popular videos on a topic in the past year. Here's a screenshot for the most popular videos on gardening this year, sorted by view count:



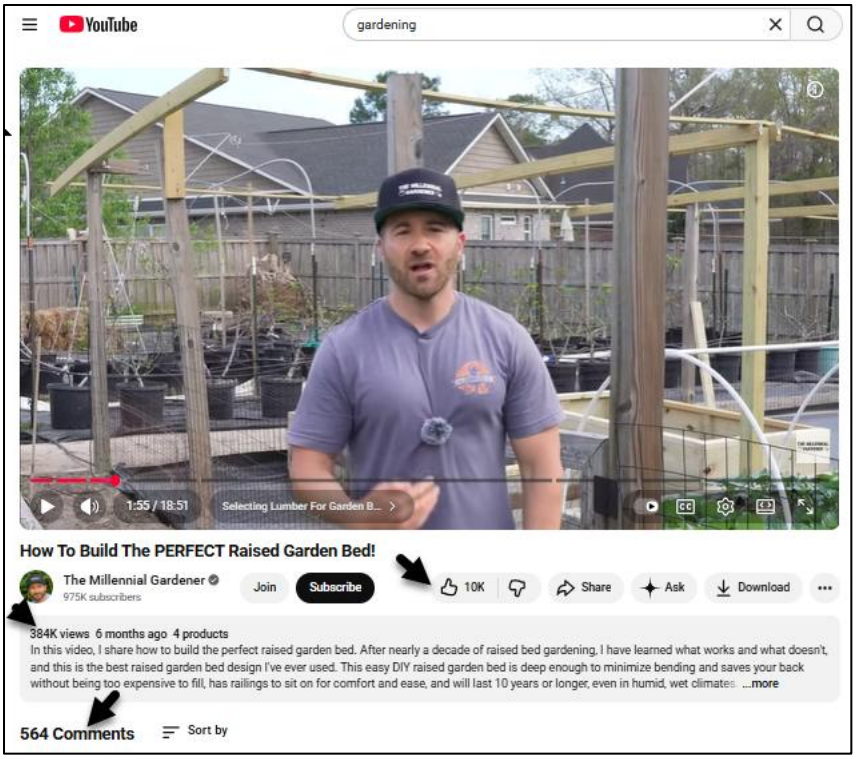
You can also use Filter to search for Channels by keyword. Enter your keyword, such as "organic food," and then under Type, select "Channel." This is a quick and easy way to find the most popular channels by keyword. Note that, as on the Google search engine, a search for "Organic Food" (with quotes) is different than a search for *Organic Food* (without quotes). Play around with your keywords and social media themes to identify the most popular Channels in your niche.

Your goal here is to take your content themes, search YouTube, and identify what's popular in terms of individual videos and specific channels (i.e., companies to emulate or competitors).

> **AI PROMPT.** Give ChatGPT your keywords or themes for YouTube marketing. Prompt: "Identify the top twenty videos as measured by engagement (views, likes, and comments) of the past three years on these themes."

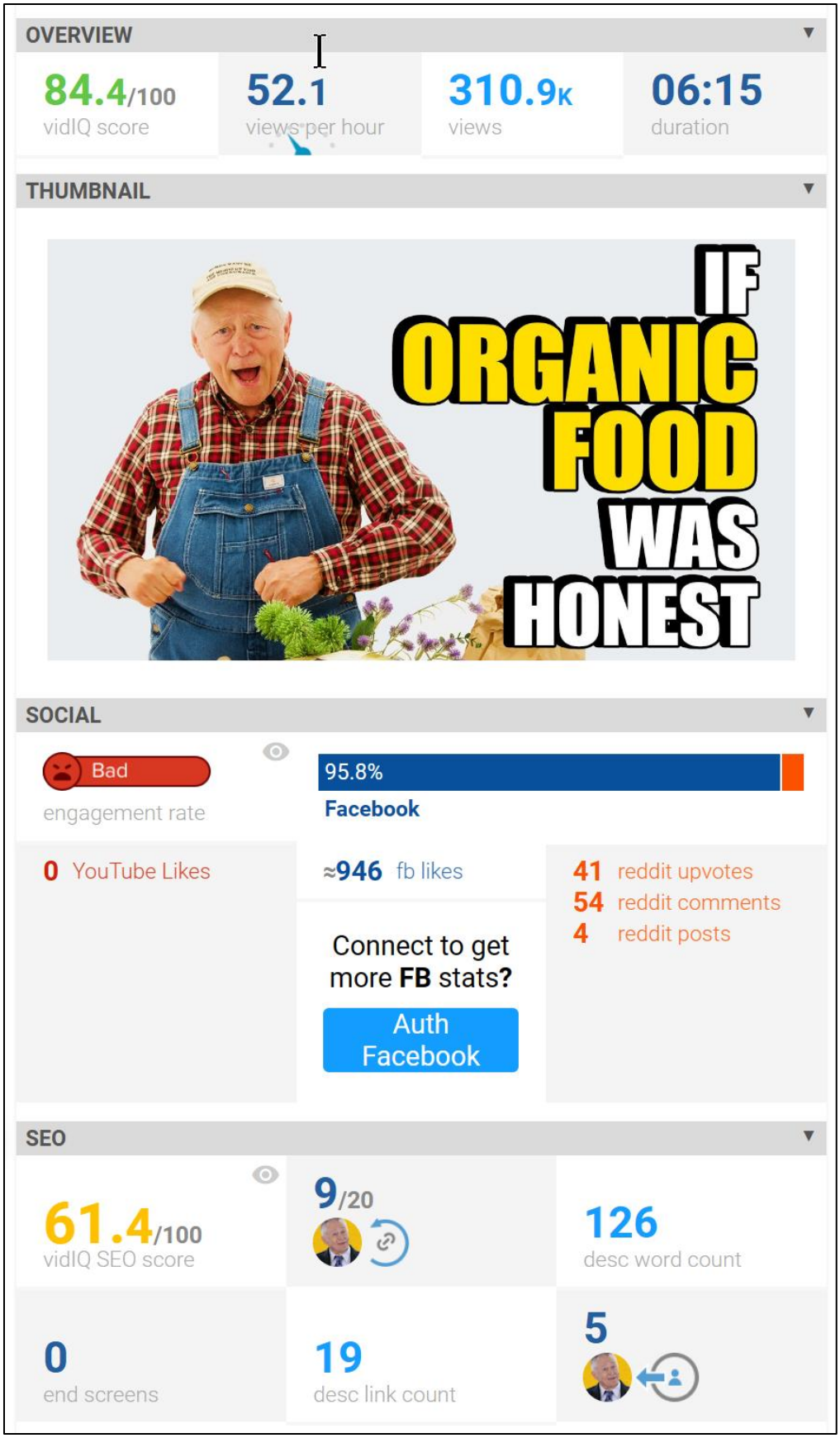
With your list of target videos in hand, click on specific videos and identify what sorts of topics you find people producing and watching in your industry. Pay attention to the thumbs up/thumbs down count and comments per video. Like a skilled party planner, you aim to identify the types of entertainment that attract and engage your guests.

Regarding a specific video, focus on the total views, thumbs up, and comments. Here's a screenshot of data for the video "How to Build the PERFECT Raised Garden Bed!"



This means the video had 384,000 views and 10,000 thumbs up. (Note that YouTube no longer publicly reveals "thumbs down.") If you scroll down to comments, you can see the **comments** count (564) and read through them. You can also see the date a video was published. In this way, you can see how "popular" a video is on YouTube and how "interactive" it is in relation to the user base. This video is clearly a superstar in terms of "engagement" around gardening. New for 2026 – if you click into the description, you can usually get the video transcript. You can then copy/paste this into ChatGPT and have it analyze the content itself.

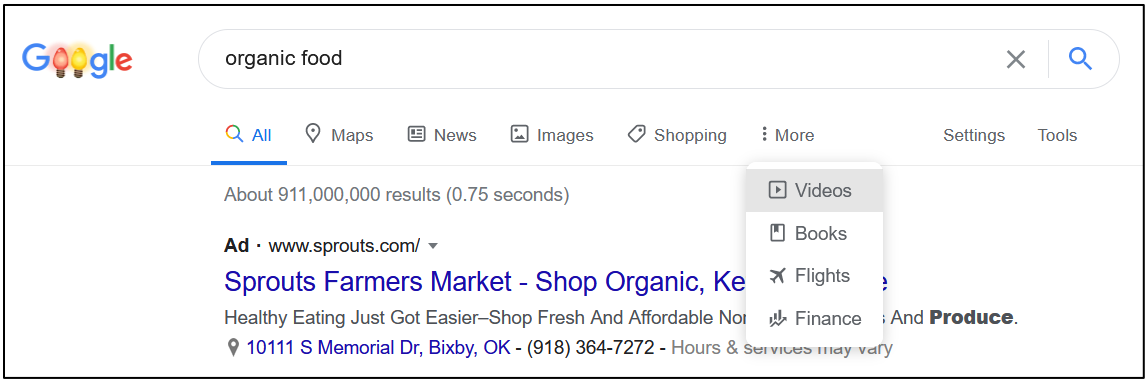
Two effective tools for gathering more data are *TubeBuddy* (**https://jmlinks.com/53r**) and *vidIQ* (**https://jmlinks.com/53s**). Each has a free and a premium version. Here's a screenshot of data from vidIQ for the video "If Organic Food Was Honest:"


OVERVIEW
84.4/100
vidIQ score
52.1
views per hour
310.9K
views
06:15
duration
THUMBNAIL
IF
ORGANIC
FOOD
WAS
HONEST
SOCIAL
Bad
engagement rate
95.8%
Facebook
0 YouTube Likes
≈946 fb likes
41 reddit upvotes
54 reddit comments
4 reddit posts
Connect to get more FB stats?
Auth Facebook
SEO
61.4/100
vidIQ SEO score
9/20
126
desc word count
0
end screens
19
desc link count
5

For your own videos and channel, VidIQ provides you with information both during production and after upload. I highly recommend using it or TubeBuddy. In this way, as you begin your YouTube research, you can identify channels and videos from competitors and companies to emulate, and then drill down into specific videos to examine data on user engagement and the hidden optimizations added to the video by the creator. Then, you can use this feature on your videos to see how well an individual video is performing.

Search Google and ChatGPT for Videos and Channels

Another way to find interesting videos is to search Google by keywords. First, type your keywords into Google and then click the *"More> Videos"* button. Here's a screenshot:



You can also use the button "Tools" on the far right 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.

ChatGPT can also help you identify videos and channels to put on your list of "companies to emulate." Prompt ChatGPT by explaining your business and target customers, and then ask it to identify the "top five" YouTube channels that might be similar or worth investigating as inspirations for your own YouTube marketing strategy.

By browsing, searching YouTube directly, searching Google, or leveraging ChatGPT to identify videos, your objective is to find channels and videos similar to your own targets that have high view counts, as well as high thumbs-up and thumbs-down ratings, 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? What keywords or themes seem to be the most popular? Why?
- Are **individuals** ("content creators") and/or **companies** similar to yours on YouTube, and if so, what kinds of videos are they producing? Look out for competitors and companies-to-emulate.
- 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 **TO-DO**, download the **YouTube Research Worksheet**. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), 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.

» UNDERSTAND THE FOUR PROMOTIONAL USES OF VIDEO

While YouTube has channels, subscriptions, and social spread similar to other social media platforms, the lion's share of activity comes **directly** from the videos themselves. Therefore, it is crucial to comprehend the four primary promotional uses of video.

#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 they convey a lot of information quickly and easily, and they also 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 non-threatening way, videos provide an 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 are not meant to "go viral" but rather to "support" the content of a website:

> **Tobin Injury Law (https://www.tobininjurylaw.com/).** Notice the embedded YouTube video in the center of the homepage.
>
> **Walkup Law** (**http://www.walkuplawoffice.com/**). Again, notice the video in the center of the homepage. Note that this one is not hosted on YouTube but rather on their own website.

The hosting location, however, 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 with an "easy" way to acquire some "emotional intelligence" about the law firm.

> *A **supportive** video explains what your company offers, utilizing a friendly, visual format to convey emotional trust.*

Another area that uses videos in a supportive way is the technology industry. Take a look at the Analog Devices channel (**https://jmlinks.com/13b**). Browse videos on their channel, and you'll see many "informational" videos, including many shots of industry trade shows. Essentially, they are taking a video recorder to a trade show and recording the "dog and pony show" that each product marketing engineer gives to a prospect who approaches the trade show booth. The dance goes like this:

> *Hi, what new and exciting products does Analog Devices have for engineers that you're exhibiting here at the Embedded World Tradeshow?*
>
> *Hello, my name is John Doe, Product Marketing Manager at Analog Devices, responsible for 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, shareable **content** that it can post to its Facebook, X, 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 Beyoncé's latest over-the-top music video. That's not their purpose.

Analog Devices' use of YouTube is all about **support**: utilizing YouTube to reach highly qualified target customers, rather than aiming for massive view counts.

> **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. Even if your goal is only to use video to support your website, you want to research the type of content that engages your customers and produce it 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.

Showing Rather than Telling

If you have "how to" content that is best explained visually, videos can be a fantastic addition to your social media marketing. Any 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 as 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!

#2 Use of YouTube: Search Discovery or SEO Use of Video

YouTube is the number two search engine behind Google and far ahead of Bing. One of the heaviest uses of YouTube is for "how to" searches. YouTube attempts to suggest videos to viewers that it is "likely" they will watch.

VIDEO. Watch an official YouTube explanation of how its algorithm works at **https://jmlinks.com/59b** and a newly updated version for 2025 at **https://jmlinks.com/77c**.

Take everything official with a grain of salt, however. The algorithm is secret, and I believe most Googlers and YouTubers know no more about it than we do. They spout propaganda and obvious ideas that do not necessarily work in practice. That said, the obvious relationship is that YouTube figures out what a viewer likes, and then YouTube pushes videos to that user that it predicts will keep them on the system. It's that simple, and that complicated.

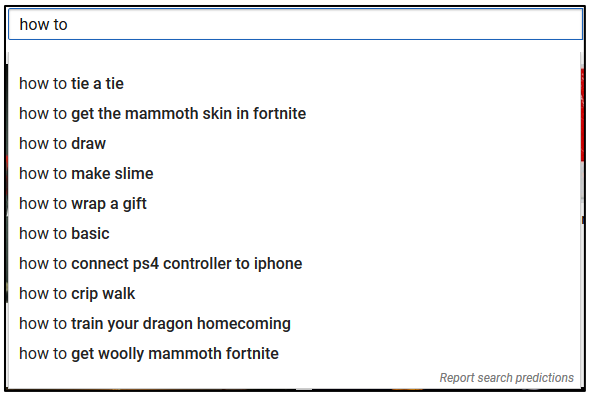
The idea here is that there are two SEO uses of YouTube:

1. Traditional SEO. That is, optimizing a YouTube video to show when a user proactively searches for it by keyword.
2. Recommendation Engine SEO. That is, optimizing your content for both keywords and engagement, so that YouTube pushes the video into the feeds of people it predicts will engage with it.

These are similar but not the same. The SEO use is more transparent. The recommendation engine use case is less so

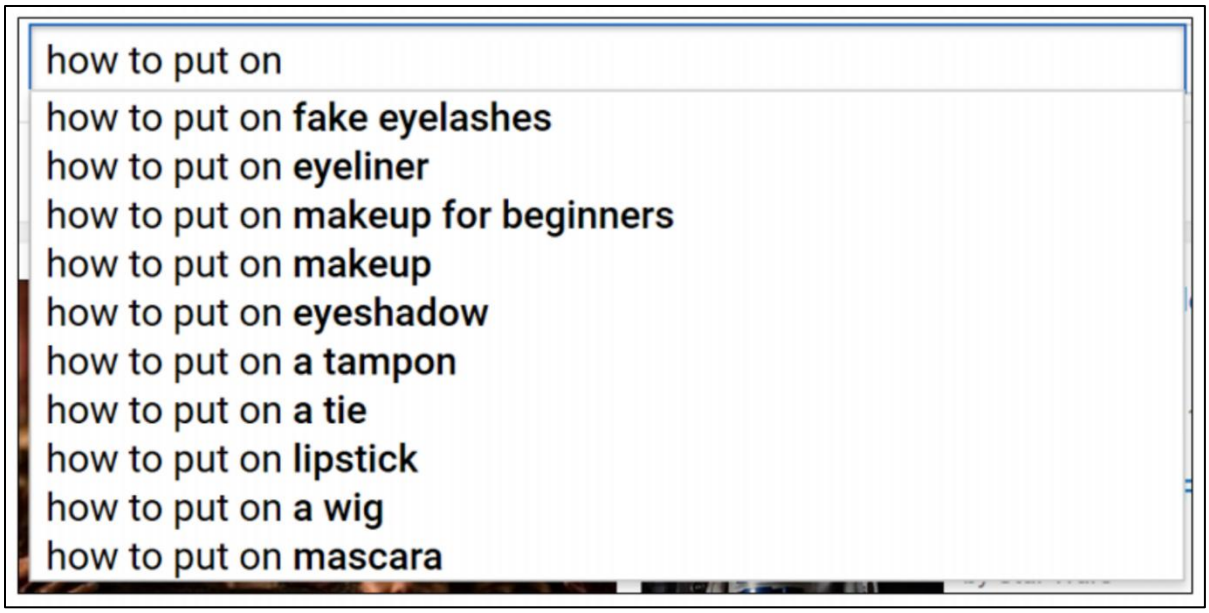
Regarding your own videos and customers, you should begin by identifying relevant keywords. Go to YouTube and start typing "how to" and you'll see a list of common YouTube searches.

Here's a screenshot:



You can also type other words more relevant to your company, like "How to grow" or "How to put on," etc. to see more specific "how to" searches applicable to your industry. If your company has any "how to" content, especially "how to" content that is best explained visually, you can SEO-optimize YouTube videos to show up for search.

Let's say, for example, that you sell pet food. People who have a new puppy are often curious about how to potty train it. 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 within that video, you can embed mentions and links to your website for more information and to purchase products. 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:

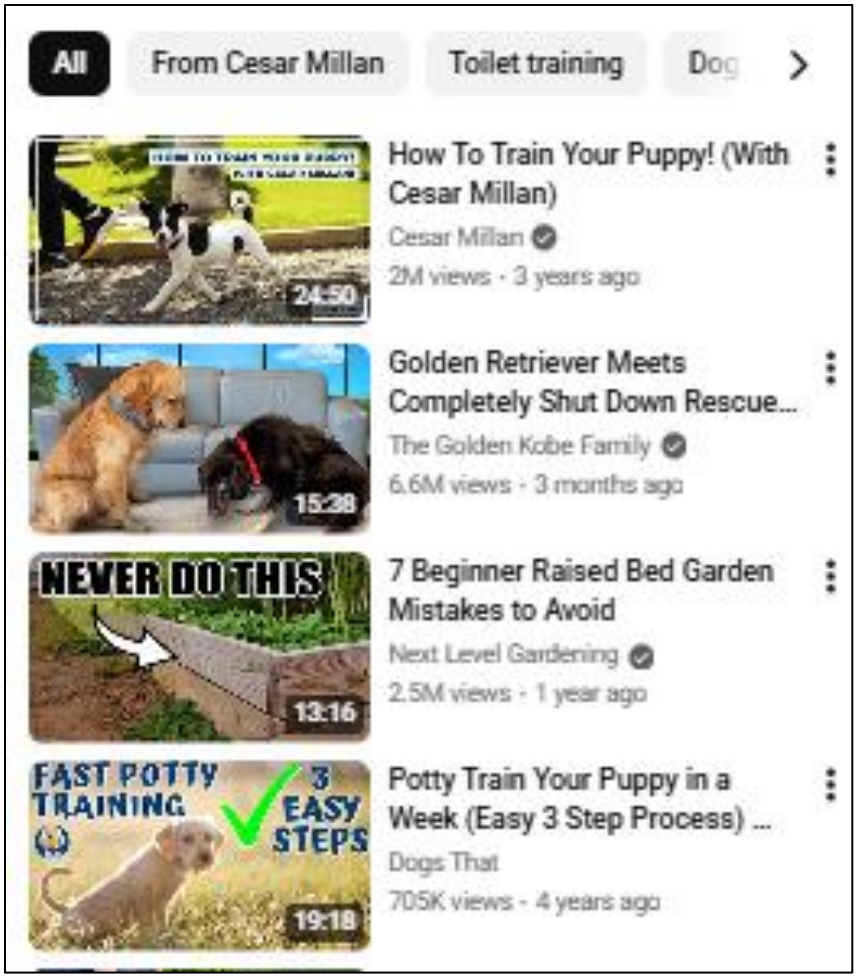


Your first step is to do some keyword research. What types of searches are people making on YouTube that are relevant to your product or service? Use "YouTube autocomplete" by simply typing keywords into YouTube and paying attention to what people enter (this is driven, primarily, by keyword search volume). Use a tool like Ubersuggest or Answer the Public, which pulls "suggestions" from Google for keyword discovery. If you have a Google Ads account, use Google's Keyword Planner tool to identify high-volume, high-value keyword searches on Google (which generally also translate to YouTube). Check out my Dashboard at **https://jmlinks.com/smmdash** > *keywords* for more free tools to research keywords.

A video channel that is 100% built around "how to" searches is *Cesar Millan* at 3.36 million subscribers at **https://www.youtube.com/@CesarMillanOfficial**. 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 Cesar's video in the #2 spot for "how to potty train a puppy" on YouTube search:

Similarly, 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. Zak's Channel is a good example of an SEO-focused YouTube marketing strategy.

Also, as you do your research, pay attention to the suggested videos that come at the end of a video as well as in the right column. These are good clues as to what the algorithm believes are likely to spur continued user engagement. Here's a screenshot of suggested videos to the Cesar video above:



You can see that video titles, views, likes, comments, and shares clearly impact this list. But if you look closely, you'll see a video on the gardening topic. YouTube takes into account how I have previously engaged with content. This recommendation engine system is similar to those found across all platforms; the platform attempts to learn about the user and push videos that are likely to keep them engaged, whether related specifically to the most recently watched videos or other videos in their past behavior. Indeed, since Google owns YouTube, you can also suspect that it may snoop on previous Google searches (and Google AI encounters) as well.

Branded Keywords: Your Competitor Names

Also, pay attention to particular 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, YouTube searches such as "Netgear router set up" or "How to

use a Black and Decker drill" are ripe for this type of adjacent keyword optimization. With recommendation engines in play, you might consider optimizing for competitor names as a comparison of your brand versus theirs.

Optimize Your Video via SEO for YouTube

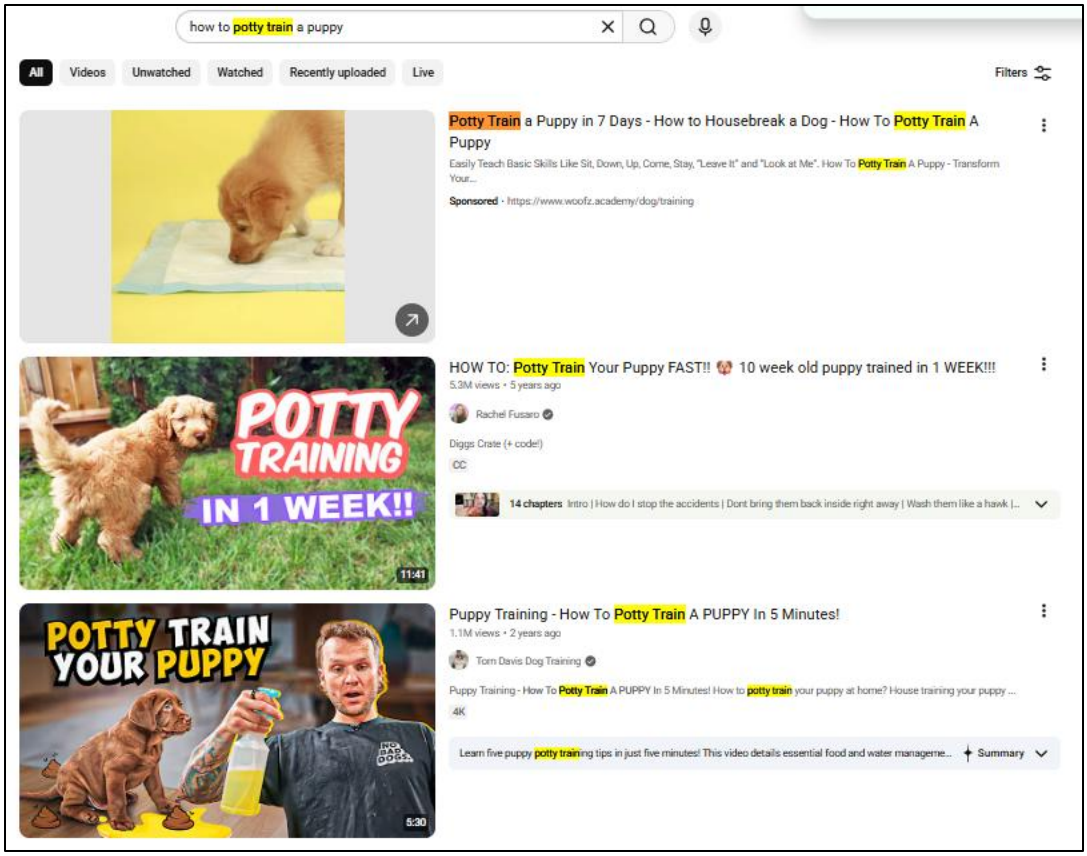
Once you've identified keywords that people search on Google and/or YouTube for video content, it's time to optimize your video using the tactics of search engine optimization or SEO. Here's what to do:

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 still showcase your product or service.
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." If possible, upload subtitles or closed captions to the video.
5. **Optimize the Video Tags**. When uploading the video, use no more than five keyword-relevant tags.

> **VIDEO.** Watch a video tutorial on SEO for YouTube at **https://jmlinks.com/77d**.

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 a temporary version first and come back later to optimize.

Here's a screenshot of the top three results for "How to potty train a puppy" that highlights how the keyword is in all three video titles:



Try this search and drill into the video description as well as the video transcript. You'll see some basic SEO tactics vs. the target keyword. Do this for your own videos.

Learn "How To" Optimize a YouTube Video for SEO

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 **https://jmlinks.com/1w**
- How to stop a puppy from chewing on a leash at **https://jmlinks.com/1x**
- Living wills and advance directives at **https://jmlinks.com/1y**.

It's easy to optimize the video's headline, description, and tags (which are not visible to the user). That's your first step.

Next, consider **engagement**. This is the next step for both traditional SEO and recommendation engine optimization on YouTube. In rewarding videos with top search positions, YouTube pays close attention to the number of views a video has and its level of engagement, similar to the way Facebook rewards posts with high engagement. Indeed, the trend is towards "recommendation engine" in the algorithm and away from subscriptions. Videos that receive clicks, watch time, thumbs up / thumbs down, comments, and shares attract more attention in the algorithm. Boring videos get less. The premium is thus on "shock value" first, engagement second, and subscriptions a distant third.

Now, not every video is meant to "go viral." Nonetheless, think like your target customer. 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 engagement?

- **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 **https://jmlinks.com/31z**) are clickable pop-ups in a video that can lead to actions such as links to your website. "End screens" (see **https://jmlinks.com/31y**) enable you to recommend other videos and playlists, as well as encourage viewers to subscribe to your channel, at the end of a video.

Here's a screenshot of the "i" information link that pops up in the top right of a video:

That little "i" pops out a few seconds into the video, and if the user clicks, they see a small ad. He can then click on this and go to the website. Video "cards" are thus ways to tease your users with "more information."

Saturday Night Live (SNL) consistently utilizes this feature. Visit their Channel at **https://www.youtube.com/@SaturdayNightLive** and watch a video. At the top right of any video, look for the "circle I." Click on it, and you'll see your browser jump to links with "more information." (Note: this only works on the desktop).

You can create clickable links to other videos, as well as to the subscribe feature, and you can create messages to users that encourage interactivity. For the official YouTube help article on creating a custom subscribe button for your videos, visit **https://jmlinks.com/32b**. You can access the help file on cards and end screens at **https://jmlinks.com/53v**.

"SEO" means ranking your video in **search**. The "recommendation engine" refers to having your video **suggested**. Both require attention to keyword themes, video titles, descriptions, and transcripts.

But that's not usually enough. For success at both, the YouTube algorithm pays attention to video likes, comments, and shares as well as "watch time." Indeed, it's increasingly clear that YouTube rewards videos that have long "watch times," meaning people stick around and watch all or most of the video. So, as you create video content, pay attention to the watch time data (available in *YouTube Studio* via your YouTube Channel). YouTube wants "sticky" content – content that people want to watch, continue to watch, thumbs up, write comments, and share. Quality, as measured by user **engagement**, is thus job #1 for success on YouTube. All of this applies to YouTube "Shorts" as well, although they are discovered by users primarily through watching, rather than searching.

Promote Your Videos Externally

Because YouTube rewards videos with high view counts and engagement, promoting your video is a key part of success on the SEO path. Have an external **promotion strategy** ready for every video as soon as you upload it. Since YouTube prioritizes view count (higher is better) as well as interactivity, utilize your other social networks to promote your video. Post your video on Facebook, X, LinkedIn, etc., and share your video link via email. Consider advertising the video upon launch on YouTube (**https://jmlinks.com/13d**), to drive both the view count up as well as other interactions. "Embeds" of your video (when your video is embedded or linked to from an external website) and links to your video from external websites are also important signals to help drive a video to the top of search. The more views your video receives,

the more embeds of your video appear across the Web, the more links to your video, 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 AND IS RECOMMENDED TO OTHERS

Once on the top of YouTube search, a **virtuous circle** can kick in: the more a video 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 recommendations, and so on.

#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, X, or LinkedIn. Videos are highly shareable! Why? Mainly because video can convey **emotional content** in a much easier way than text or images can. 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 or family. For example, a video on "how to make your Facebook completely private" (**https://jmlinks.com/1z**) has over nine million views. Creating something so useful that people share it with friends and family is one effective 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**, as it can encourage sharing without adverse side effects on your brand image. A famous example of YouTube sharing is Dr. Squatch soap (**https://www.youtube.com/@DrSquatch**). The snarky, humorous men's soap brand utilizes both advertising and viral sharing to convey its message about its natural, organic soap. Watch channel videos like "Save Your Skin with Dr. Squatch Soap" (**http://jmlink.com/74u**) at 175 million views or "Dr. Squatch – Natural Soap for Men (**https://jmlinks.com/74w**) at 122 million views. You'll see an innovative use of humor that not only makes an engaging video but also encourages people to listen to its commercial message and share it with their friends. It's advertising at its best, leveraging YouTube to share success. In fact, if you think about it, I just posted a free ad for Dr. Squatch soap in this Workbook! That's the point.

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 exceptionally funny. Other fun examples are "Girls don't poop" (**https://jmlinks.com/2b**), This Unicorn Changed the Way I Poop (**https://jmlinks.com/44k**), or "The man your man could smell like" (**https://jmlinks.com/2c**). For the latter, I recommend you read the Wikipedia discussion at **https://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."

> **AI PROMPT.** Ask ChatGPT to analyze your brand, target customers, and keyword themes for YouTube. With that in mind, prompt: "Please identify ten content strategies for our videos that would encourage sharing. We're looking for ways to encourage users not just to watch our videos, but to thumb up, comment, and (most of all) share a video with their connections."

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 forth. For a video to go viral, it must have a strong emotional appeal, and to get started, it typically requires aggressive 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 emotions can be used to encourage social sharing. Examples of this strategy are "Dear 16-Year-Old Me"

(**https://jmlinks.com/1p)**, "Dear Future Mom" (**https://jmlinks.com/2e**), and indeed, the majority of the "Dove" YouTube Channel (**https://www.youtube.com/@doveunitedstates**). These videos feature real people sharing authentic emotional stories about a social cause or problem. People share them to "support" the cause.

> **VIDEO.** Watch a video tutorial on how the YouTube algorithm is changing, what goes viral, how, and why at **https://jmlinks.com/57n**.

Finally, I want to draw your attention to "covers" and the concept of "piggybacking" on other trending videos. If you don't know, a "cover" is a music video done using the music from a more popular video. An example of this is Mike Tompkin's video on Miley Cyrus's "Party in the USA" (**https://jmlinks.com/2f**). The strategy is to "piggyback" 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 excellent videos. Then, users "subscribe" to his channel, and he has a promotional vehicle that combines YouTube search and viral sharing, because his videos are strong and innovative enough to be shareable in their own right. Check out the hashtag #cover on YouTube at **https://jmlinks.com/74x**.

> *It's not 'search or share' on YouTube: it's 'search and share.'*

Indeed a video such as Tompkins' "Starships" (**https://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" (**https://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.

Dove Soap

Probably one of the most boring products you buy is soap. But Dove soap takes soap and beauty products to a whole new level on YouTube. The brand focuses on "real beauty" and features edgy videos that explore what constitutes beauty, particularly for young women. Many of the videos have not only won awards but also achieved massive view counts, high engagement, and shares. Check out the Dove YouTube channel at **https://www.youtube.com/@doveunitedstates**. One of the most popular videos

is "Dove | Beauty on your own terms" with the branded hashtag *#MyBeautyMySay*. Check it out at **https://jmlinks.com/74y**. It has clocked in at 13 million views, 16,000 thumbs up, and 903 comments. It's massively viral because it resonates with today's women, youth, and self-expressive culture. It's almost as if Dove is a non-profit advocacy group for women, rather than a subsidiary of a for-profit corporation, namely Unilever, with a market capitalization of $ 148 billion.

But hold on a second. Let's reverse-engineer Dove and its video strategy as a marketer, seeking to understand how for-profit companies might capitalize on socially popular themes. If *Dove* had created a video about soaps, shampoos, or makeup removers, it wouldn't have exactly been an award-winning, viral video. Soap is boring and not exactly a topic people would share. Clearly, Dove brainstormed a message that blended seamlessly into its corporate brand, addressed women's issues, and had the potential to go viral by being both emotional and counterintuitive. The brand message (*buy Dove products*) takes a back seat to the socially conscious message about our prejudices concerning what it means to be beautiful as a young woman in today's social media society.

> 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, humor is the best emotion, while for many non-profits, sentimentality and causes that people actively support are effective mechanisms to spur social sharing. If you can identify a potential concept for a viral video for your company, product, or service, I recommend watching the YouTube video "Why Storyboard?" at **https://jmlinks.com/53w**. Before investing blood, sweat, tears, and budget in an attempt to "go viral," first storyboard your video and test-market it.

> **AI PROMPT.** Ask ChatGPT to analyze your brand, target customers, and keyword themes for YouTube. Pick a topic and then prompt it, "Using the core idea of 'X,' please storyboard this video, which will be under three minutes in length. Pay special attention to the first ten seconds or 'hook.'"

Here's one final thought. Don't be intimidated by "viral videos." You and your company might not be able to make an over-the-top viral video with view counts in the hundreds of thousands. However, think about the reasons why a user might share your

video. Is it funny? Is it humorous? Does it touch on a sentimental emotion? Even if your video doesn't "go viral," you can engineer emotional touchpoints and calls to action to encourage a viewer to share it with friends and family, thus expanding your reach. It's not ultimately *supportive versus SEO versus viral in terms of video production; it can be both and.*

#4 Use of YouTube: Subscription

Back when I was a kid in a galaxy far, far away, we had three TV channels. We didn't even have a remote. Then, we got cable TV, and suddenly, we had about fifty channels. There was a *cooking* channel, a fishing channel, a channel about country drives around Oklahoma, and even a *porn* channel (which my brother and I continually tried to access by pressing various button combinations on the clunky cable TV remote). You get the picture: there was a channel for nearly everything, and broadcasters started micro-broadcasting. Fisherpeople needed a channel about fishing; cooks needed a channel about cooking, and hormonal teenage boys needed a channel about…. you know, where to go for long drives in Oklahoma.

The fourth use of YouTube is this "subscription" model. You (meaning you, as an individual, or your company or brand) produce a channel with informative content. It could be "how to" content such as "how to" fish. Or it could be political content, as in commentary on our crazy political system. Or it might just be "deep dives" into murder and mystery. Your path to success is to define an audience and produce content that that audience wants so much that they will "subscribe" to your YouTube channel and eagerly await your next video.

As for how to make money, your paths to revenue are subscription fees (often via Patreon), ads via YouTube monetization, embedded ads within your videos (including those for your own products or services), and spin-offs such as paid training or "premium" features to "paid" subscribers.

Here are some examples:

> **Khan Academy** (**https://www.youtube.com/c/khanacademy**) – a channel focused on teaching kids math and science.
>
> **Murder, Mystery, and Makeup** (**https://www.youtube.com/c/BaileySarian**) – a channel that provides "deep dives" into true crime while also showcasing makeup skills.
>
> **Economics Explained** (**https://www.youtube.com/c/EconomicsExplained**) – a channel explaining current and historical events from the perspective of economics.

Zach George's Dog Training Revolution (**https://www.youtube.com/c/zakgeorge**) – a channel on how to train your puppy or dog, also soliciting you for Patreon support (**https://www.patreon.com/zakgeorge**) and best-in-class dog and puppy products.

Thus, in the "subscription" model, you build content that people want, and you make money by selling "premium" content or placing ads within your content. More recently, this has also become a type of "influencer" business strategy, in which a channel creator with thousands or millions of followers sells ads on their channel that are "product placements" within the content, without necessarily disclosing to their viewers that this is a "paid sponsorship." Is it legal? Probably not (ask the FTC or your lawyers). Is it widespread? Increasingly so.

Which of the Four 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 essentially utilizes YouTube as a hosting platform rather than a promotional system.

Search / SEO / Recommendation. To the extent that people search for keywords near your product or service, you can optimize your videos for discovery by search and recommendation. Then, remember to sell something after they discover your videos!

Share / Viral. To the extent that your videos have emotional content, you can encourage discovery by social sharing and even virality. This viral promotion then builds your brand.

Subscription. To the extent that you are a skilled content creator, you can create content that drives YouTube subscriptions and then sell premium content and/or affiliated products or services.

Remember that in all cases, you typically need to utilize external promotion tactics, such as sharing your videos on Facebook, X, and LinkedIn, reaching out to influencers who

can help promote your videos, and even advertising on YouTube to expand the reach of your videos.

» TELL STORIES THROUGH VIDEO

Humans love stories. From our prehistoric roots around campfires to today's multimedia digital environment, we've been wired to respond to narrative. Who said what to whom? What happened next? Why are you telling me this? And, above all, where's the emotional thrill in what you're telling me? In the beginning was the Word (John 1:1), and we're all wired to respond to it.

Video, whether on YouTube, Facebook, Instagram, or elsewhere, is an ideal **storytelling** medium. Look back at some of the videos I've mentioned above. Notice how they follow the elements of story from hook to rising action to climax to falling action. Indeed, whatever video you are working on should follow the elements of story as described by many, including Ron Popeil," the so-called father of the infomercial.

> *It slices, it dices, but wait, there's more.*

Popeil and others have identified these elements to an engaging story of any type:

1. **The hook**. Capture their attention with an ear- and eye-grabbing first scene. Shakespeare started many of his plays with an explosion, a few witches, or a fight scene in order to capture the audience's attention, and so should you.
2. **The problem.** Here, especially when you're selling something, you need a statement of the problem. It can be as simple as, "Your puppy won't stop biting the leash," or as complicated as "The multitudinous ways in which girls can put on eyeliner." But there needs to be a problem or challenge that the viewer wants to solve or at least learn about.
3. **The solution**. Here's where you (and your product or service) come in. You have the solution to the problem, and you ask the viewer to allow you to explain how.
4. **The Soft CTA**. You, implicitly or perhaps even explicitly, begin to explain to the user your call to action. It can obviously be for them to "buy your stuff," but in some way or another, you start to lay the groundwork for them to "want" what "you have."

5. **Credibility**. Why are you an expert? What's so great about your product or service? A problem calls for a solution, but why is your solution so great, and why should the viewer believe you?
6. **The Hard CTA**. Here's the hard call to action: tell the viewer to "act now" while "supplies last" or perhaps offer a coupon or discount code that expires in 24 hours. You want to motivate them to "pick up that phone" or "click that button!"
7. **The Gush**. This concept comes from Derral Eves (**https://derraleves.com/**), a prominent YouTuber and teacher of everything YouTube. Eves uses "The Gush" to signify that final, often humorous, kickback that comes after the hard call to action. The camera returns, and we see something amusing or intriguing that makes us laugh and helps us retain the message.

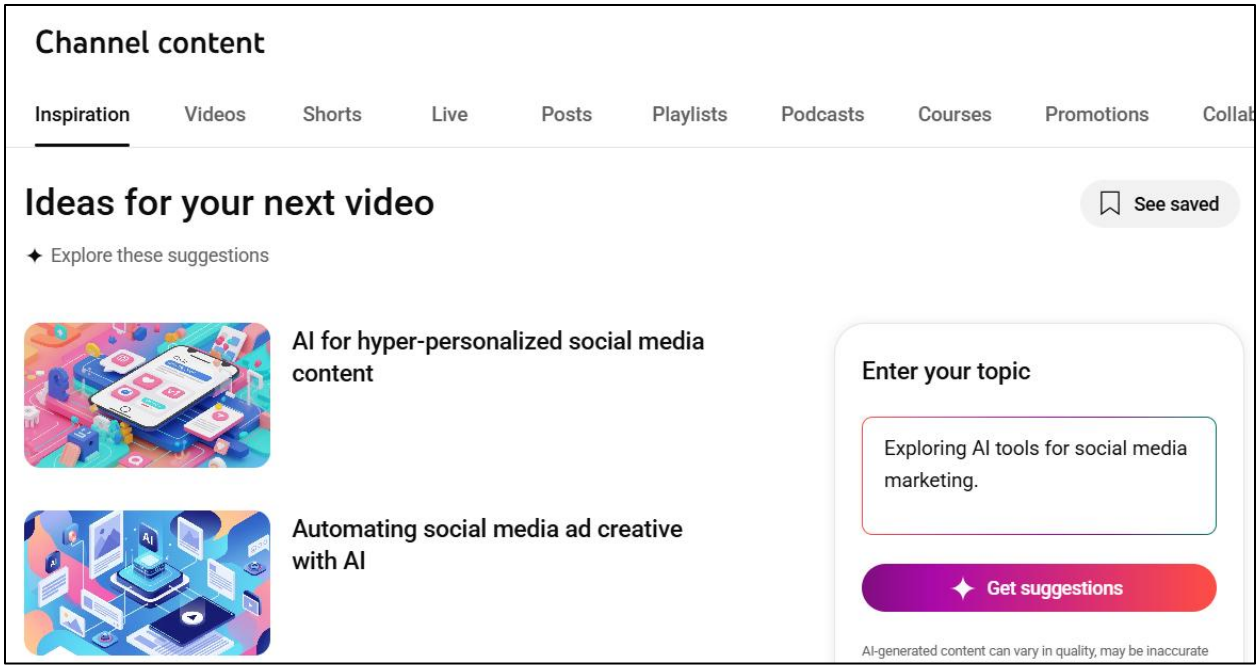
Go back and re-watch the Squatty Potty infomercial on YouTube, "This Unicorn Changed the Way I Poop," at **https://jmlinks.com/44k**. As you watch, notice how it progresses through the seven phases above. Notice as well how it uses outrageous humor and funny, sort of disgusting graphics to hold your attention and motivate you to share this video with your friends and family, if only for the reason that it's funny. It's a great example of an infomercial on YouTube. With 42 million views, 146K thumbs up, and hundreds of comments, this video has leveraged YouTube's algorithm to help make the Squatty Potty a household word.

This video, like all successful videos on YouTube, tells a story.

Storytelling isn't straightforward, but it isn't exactly rocket science, either. Storyboarding is a step-by-step methodology to help you plan and organize the production of your videos. Check out an excellent video on how to storyboard by YouTubers Mary Doodles and Whitney Lee Milam at **https://jmlinks.com/44n**. While you're there, check out the cornucopia of videos about how to do YouTube successfully at the official *YouTube Creators' Channel* at **https://jmlinks.com/44p**. Then, take your own product or service and brainstorm a "story" around it, perhaps in a straightforward infomercial format or perhaps in some question-and-answer format that will appeal to your target customers. Remember: social media is a party, not a prison, so a good story has to be compelling and engaging; otherwise, they'll stop watching. Search YouTube by keywords that matter to you and "reverse engineer" the stories inherent in the successful videos that fit your niche and delight your target audience.

New for 2026, inside of YouTube Studio (available inside your YouTube channel), you can use AI to brainstorm content. Click on Content > Inspiration. On the right, click into "Enter your topic" and type a basic idea. On the left, YouTube will create

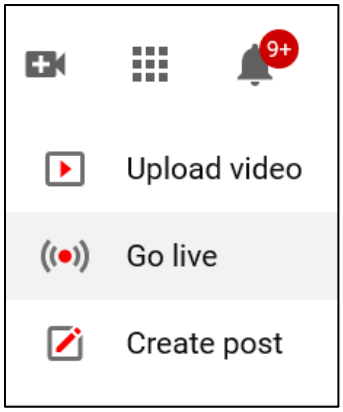
thumbnails, video titles, and summaries that you can use to start brainstorming a video idea. Here's a screenshot:



You can, and should, also use ChatGPT to brainstorm content ideas and create the initial storyboard for a video. AI is a game-changer when it comes to story creation!

Live Video is a Story, Too

Even if you're going to do live video on YouTube, you want to think in terms of story. Imagine giving a live theater or stand-up comedy performance. You might be very spontaneous, but you'll still have an idea of your hook, the script you want to follow, and even the call-to-action you might want from your audience. Even live video is a form of storytelling. You can "go live" either on the YouTube app for your phone or via the desktop – click the camera icon at the top right and then "Go Live." Here's a screenshot:



If you click "create post," you can now post messages to YouTube that will show to your followers when they log in to YouTube. In this way, YouTube is attempting to become more like Facebook or LinkedIn. You can upload a video, create a poll, or upload an image. Learn more about "community posts" at **https://jmlinks.com/53z**. Learn more about how to go live on YouTube at **https://jmlinks.com/55g**.

Write Your (Draft) Story and Get Technical

Your **To-Do** here is to create a draft story. Then, your next task is to address the technical aspects of shooting the video. You'll need a script, actors, a set, and an outline of the scenes. The technical aspects of video production are outside the scope of this book, but realize that a few Google searches can help you with everything from how to write a short script or storyboard to the best video cameras, microphones, and other technical things you'll need. You can also look for local videographers to come to your place of business and help you shoot one or more videos. Just be aware that, in my experience, those who excel at the art of telling stories (a.k.a., writers) are not necessarily the same people who excel at the technical skills of shooting or editing video (a.k.a., photographers). They possess two different skill sets. Finally, you'll need to either edit your video yourself using software such as Windows Movie Maker, Apple iMovie, or more sophisticated software products like Camtasia. YouTube even has its own built-in editor accessible after you upload your video at **https://studio.youtube.com**.

The result should be a short, emotionally charged, and engaging video that focuses on your solution to the desire or problem your customers have. It may have the goal of supporting your website or other social media channels, of showing up high on YouTube or Google searches, or "going viral" or at least "getting shared." However, regardless of which of the three YouTube goals your video focuses on, it must tell a compelling story.

Finally, once you upload your video, you'll want to optimize the Video Title, description, and link to more information, as well as both cards and end screens, which I'll explain in a moment.

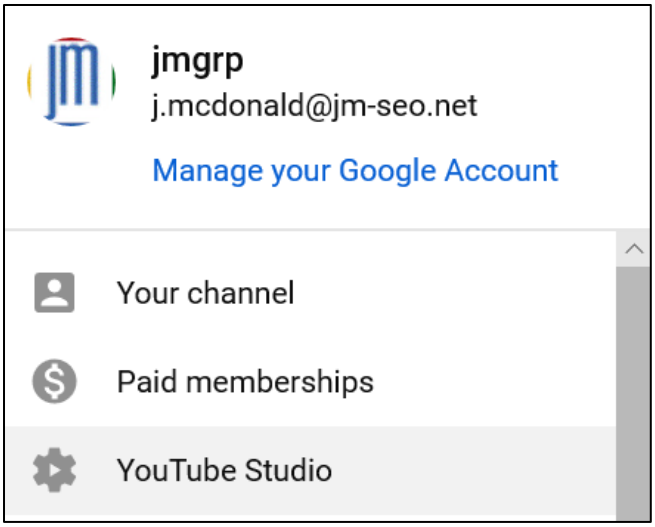
» SET UP YOUR CHANNEL AND UPLOAD VIDEOS

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 Google or Gmail account. Here are the steps:

1. **Log in 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 **https://jmlinks.com/31w**.
4. Click on "Create a new channel."

(For the official YouTube help article on how to create a channel, visit **https://jmlinks.com/12z**). At that point, you will be "inside" your new YouTube channel. (If you already have a channel, log in to YouTube.) Ensure that you keep the email address and password in a safe and secure location, as you will need them each time to log in to your Channel.

On the top right of the screen, click your profile picture, then select **YouTube Studio**. Here's a screenshot:



That gets you into *YouTube Studio*. First, set up your community settings. This controls who can comment on your videos. Go to *Settings* > *Community Moderation*, where you can manage users' ability to post comments on 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 auto-posting (where you then approve or disapprove it).

Click up to "Advanced Settings." Here, you can clarify whether you make videos for kids or not. This is important as a kids-oriented channel has many more restrictions than a non-kids channel. Next, click back to "Your Channel."

Community. Manage your community's options, such as comments and share options. Here, you can respond to comments made by viewers to your videos.

Earn. Here, you can monetize your Channel to make money.

Analytics. Analytics (accessible via YouTube Studio) provide information on your channel and videos, including how they are discovered and whether users stay engaged.

Customization. Customize your banner image, picture, home tab, etc. Importantly, you can add a Channel description, unsubscribed trailer and other features for "new users."

Audio Library. YouTube gives you a cornucopia of royalty-free music for your videos as well as sound effects.

Settings. Dig into basic and advanced settings.

To change your *profile picture*, return to the initial view of YouTube Studio and click the "Your Channel" icon in the top right corner. It can be a little challenging to toggle between YouTube Studio settings and the "View Channel" settings, so sometimes it's best to log out entirely and start over at YouTube.com. Alternatively, you can often find the settings in the far right column, under your brand icon.

Once you've made it to Your Channel, click on your picture on the top left, hover over it, and click on your Channel cover or icon to change your Channel background image or icon. You can also upload *channel art*, which is similar to Facebook cover photos, by clicking on the large photo in the middle. 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. Here, you can also create backlinks to your website and other social media sites. If things are not clickable, find the "Customize Channel" link and then click back into this or that element.

Across the top menu, you'll see "Home," "Videos," "Shorts," "Playlists," and "Posts." Click on each to explore options. Remember that to change these, you must toggle back to "Creator Studio."

One of the more important things to do is to create a "Channel Trailer." Create a video that explains what your Channel offers and – most importantly – why a user should subscribe. Click on "Customize Channel" and then "Home." You should see two bullet points marked "Channel Trailer" and "Featured Trailer," the former for people who have not subscribed to your channel, and the latter for those who have. Click on each one and select the appropriate video. Learn more from the official help file at **https://jmlinks.com/31x**.

Remember that there are two distinct areas to set up: *Your Channel look and feel* and *YouTube Studio*. If you can't find what you want on one of them, look into the other. There's no rhyme or reason as to how YouTube has organized any of this. One trick I use is to open three tabs in my browser so I can have all three elements viewable as I "hunt for Red October" to find a feature I want to change. Help is available at the top right under the "Question Mark" or at **https://support.google.com/youtube**.

Monetization

One of the key questions in setting up a YouTube Channel is whether to enable monetization. Monetization means signing up as a YouTube partner to receive a share of the ad revenue. To learn more about the program, visit **https://jmlinks.com/76j**. For most businesses, I strongly advise against "monetization" via ads to be your goal. Unless you have zillions of views, the amount paid for ads is small compared with what

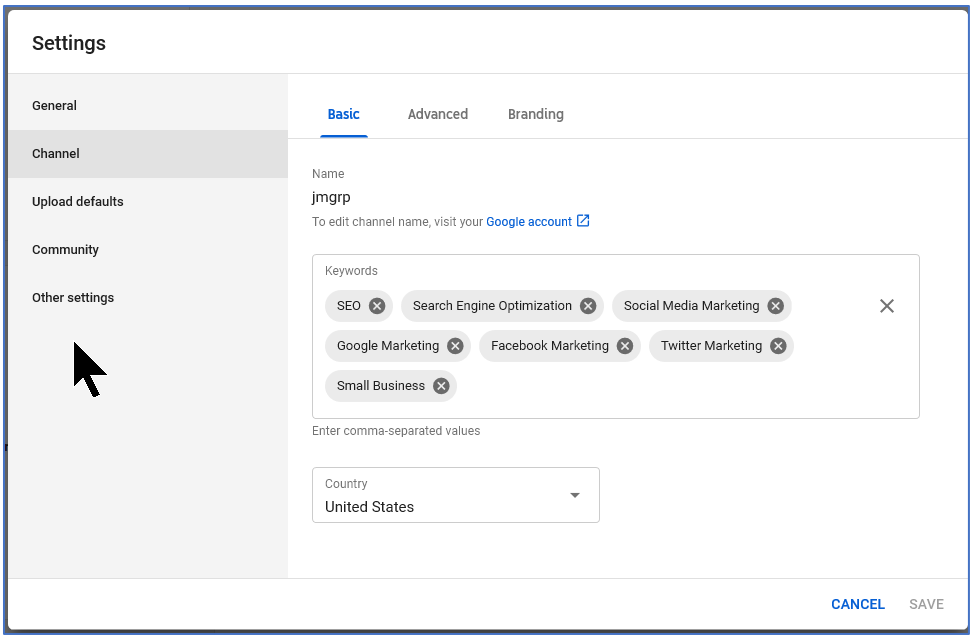
you can make using YouTube to sell swag, digital subscriptions, real products, real services, or get leads.

YouTube places ads on nearly every channel, whether monetized or not. Your videos will have ads on them, like it or not.

However, 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 enable advertising on your video via monetization).

Channel Optimization for SEO

YouTube is the No. 2 search engine, ahead of Bing (but behind its parent, Google). As I have already explained, you should optimize *every* video for YouTube SEO by including a keyword-rich title, description, and tags. You should do the same with your channel. Place keywords in your channel keywords field. To enter your channel keywords, click on *YouTube Studio* > *Settings* > *Channel* keywords. Here's a screenshot:



On the Advanced tab, you can also link your YouTube account to your Google Ads 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 *address (http:// address)* in the "Associated website" field and follow the verification instructions. You can learn more about how to link your website to your

YouTube channel at **https://jmlinks.com/59e**. At the end of this process, you should have fully set up your Channel.

Upload Videos

To upload a video, click back to your channel dashboard, then select the "upload video" icon in blue. Select a video to upload and start uploading.

Input a:

- **Video Title**: Write a keyword-heavy but catchy video title. Note: If you include a hashtag at the end of the video title, as in #socialmedia or #organic, it will appear first in the video title in public display.
- **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 keyword tags for your video.
- **Public**: Set the video to public (accessible to anyone), unlisted (viewable only by people with the link), or private (with restricted access).
- **Custom thumbnail**. Upload a custom video thumbnail, which will appear in YouTube search. Or YouTube will automatically create three options for you.

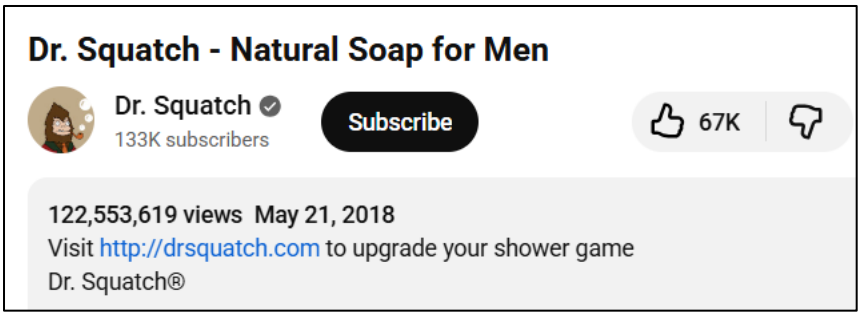
Custom thumbnails are worthy of attention. Your video thumbnail will appear in YouTube search results and alongside other videos, or at the end of a video. They serve as your "teaser" or "hook" to encourage a user to click through and start watching the video. They need to function like ads. The best thumbnails include photos of people (you, your CEO, or someone key to the company), along with some huge and bold text. Try searching on YouTube for your keywords, evaluate which videos have a high number of views and interactions, and examine their thumbnails. Learn more about custom thumbnails from *YouTube Creator Academy* at **https://jmlinks.com/44q**. I strongly recommend creating custom thumbnails for each video.

» ENABLE CLICKABLE LINKS IN YOUR VIDEO

Be sure to include a clickable link in your video description, preferably right after the first sentence, and in the format of **http://www.yourwebsite.com/**. It MUST be in

the *https://* format to be clickable! You can then reference the link for "more information" in your short video ad, such as telling the viewer, "Click on the link in the video description to learn more!"

Here's a screenshot of the video description for the hilarious, "Dr. Squatch – Natural Soap for Men:"



A user can click on the blue link and instantly go from the video description to the website (to learn more and make a purchase). So, you gotta put those *https://* links in your video descriptions.

Create Cards and End Screens in Your Video

"Cards" and "End Screens" on YouTube are yet another way to drive traffic from your video to your website. Cards are clickable links in the video itself. "End screens" occur at the end of a video and are also clickable links. To create YouTube cards or end screens that link to your website, however, you must first link your YouTube account to your website and then join the YouTube Partners Program. (See **https://jmlinks.com/49u**). This requires more than 1,000 subscribers, so it will not be available if you have a brand-new account.

To add a "card" to your video, first, click on a video via YouTube Studio. Next:

- Click on the "pencil" icon for the video.
- Scroll down on the right and find "cards." Click the "pencil icon."
- Fill out the link, card title, call-to-action, and teaser text.
- Position the "card" by scrolling back and forth in the video timeline. This controls where and for how long the "card" will appear.

Finally, save your work and then test the video on a new screen to verify that your "card" works and is positioned where you want it in the video.

"CARDS" ARE CLICKABLE LINKS IN A VIDEO

VIDEO. You can read the official Google help file on YouTube cards at **https://jmlinks.com/27h**.

Cards appear in the top right of a YouTube video and "pop out" when they occur. Users can click on them to learn more and then click through to your website from the card. Here's a screenshot showing the card in the top right corner:

Just remember to be on the lookout for opportunities to include clickable links when setting up videos and/or video ads on YouTube, such as in the video description, cards, call-to-action overlays, and the new call-to-action extension. Not all options are always available, so just be aware that you may or may not see them. To learn more about cards and end screens, visit **https://jmlinks.com/53y** for the official YouTube explanation.

For your second **TO-DO**, download the **YouTube Setup Worksheet**. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), and click on the link to the "YouTube Setup Worksheet." You'll answer and outline the basic setup issues for your YouTube channel.

» ADVERTISE ON YOUTUBE

YouTube offers robust advertising options. You can use advertising to expand the reach of your YouTube videos, especially for individuals in "search mode" on YouTube by keyword or those who are easy to target demographically, such as those who love

fishing. These people want to try out cosmetics, or perhaps religious people who want to watch Christian videos. You can use YouTube advertising to boost your video view count and engagement, and in that way, YouTube advertising can work to support your organic YouTube efforts. (See **https://jmlinks.com/32f** for the official guide to YouTube advertising).

To create a video campaign, you'll need a Google Ads account, preferably linked to your YouTube account. Although you can place text and graphic ads on YouTube, we'll assume you have a video you want to promote through advertising. With that video in hand, here are your steps.

If you already have a *Campaign* > *Ad Group* on YouTube, you can skip this section. If not, to create a video campaign, log in to Google Ads and click the blue circle. Select "Create a campaign without a goal's guidance" and then *Video* as the campaign type. Under the campaign subtype, choose among "video views," "efficient reach," "target frequency," "non-skippable in-stream," "drive conversions," "ad sequence," and "audio." (Each has an explanatory blurb and link to more information). Most small businesses should choose either "video views" or "efficient reach."

Next, follow the prompts to define:

Campaign Name. Give it an easy-to-remember name, such as *Cat Boarding: YouTube*. I recommend placing YouTube at the end so you can instantly see that this is a YouTube Campaign and not a Search or Display Campaign. Note that there are two formats commonly used on YouTube, and I recommend creating separate campaigns for each format.

Bid Strategy. This will default to "Target CPV," which is the maximum cost-per-view, as you pay by view on YouTube (more on this later).

Budget and Dates. Enter your campaign budget and any date constraints.

Networks. Here, choose **YouTube** (i.e., users are proactively searching). I do not recommend Google TV or Google Partners. Google Partners is full of scams and trouble.

Locations. Select your geographic location, such as the entire United States or a specific city or region, e.g., "San Jose, California." You will need a decent-sized population for the video to run effectively, so I do not recommend something as small as a zip code, although you can use that if you prefer.

Follow the instructions on any other settings, which are self-explanatory. For example, you can target conversions, devices, set a frequency cap (the maximum number of times a user is shown a video), and specify an ad schedule, among other options. And then name your Ad Group. Give it a self-evident name, as in "*JM Cat Boarding: YouTube*."

Next, be careful with the targeting. Targeting is set at the Ad Group level (Ad Groups live inside Ad Campaigns). The first time you set up an ad, Google Ads forces you to go through every step, but do not choose multiple targeting methods (!). These are demographics, audiences, keywords, topics, and placements. **Do not mix and match targeting methods in a single ad group!** For your first group, I would recommend that you choose relevant keywords such as, in my example, "cats" or "cat boarding."

YouTube has different types of ads. Here are the most important ones:

Skippable In-stream Ads occur in what YouTube calls the **Video Action** ad format, meaning you pay only if a person clicks through your ad, watches more than 30 seconds, or half of the video ad (whichever is less). This is the most common format.

Non-skippable Instream Ads. These are video ads that generally appear before a video. The user is forced to watch for up to five seconds, and then they can click on the ad or click "skip." If you plan to use this type, name your Campaign something like 'JM Cat Boarding: YouTube – Instream'.

In-feed Video Ads. These appear "in the feed," especially on the app or mobile phone. This is a good way to get your videos "next to" those of competitors.

Bumper Ads. These are short, six-second, non-skippable ads that appear before, during, and after a video. Major brands usually use these for "branding" and "awareness" rather than results.

YouTube Shorts Ads. These ads appear in vertical format on YouTube shorts. If you're already running ads on Instagram Reels and TikTok, this is the same format and the same type of algorithmic targeting.

Other Formats. YouTube also offers other formats such as Masthead ads and ads on YouTube Shorts.

Learn more about ad formats at **https://jmlinks.com/59f**.

Next, create your video ad. Enter the exact URL of the video you want to promote here. Follow the steps to input the ad elements, which are: a) URL (to find the YouTube video to promote), b) Call-to-action (which appears alongside the video and is a clickable link to your website), c) Headline, Long Headline, and Description (which are text elements to describe the video). You can add more than one YouTube video, and you should have both vertical and horizontal formats. Alternatively, if you plan to create YouTube Shorts or mobile ads, enter only the vertical format and target your ads specifically to mobile users.

> **AI PROMPT.** Explain to ChatGPT your ad concept – the message, target audience, and desired action. Then, as you create ads for YouTube – headlines, descriptions, and other text elements - ask it to create variations for you. For example, "Please write me ten ad headlines of > 20 and < 30 characters." Be sure to communicate the tone and concept, such as a "fun" tone and the "concept" being to download our free eBook.

As you set up each video ad, Google requires you to go through every step, even if you are not ready. Once a *Campaign* > *Ad Group* is created, you can then insert new Ad Groups and Ads much more easily, adjust targeting, and so on. Follow the steps to create your first campaign, ad group, and ad, and then managing them will be much easier. What's stupid about this is that you only have to do this the very first time, and then from then on, it's much easier to manage.

At the end of this process, you should have created your first *Campaign, Ad Group,* and *Ad*. Pause it so that it doesn't start running until you are completely ready.

Location Targeting on YouTube

Importantly, you can use location targeting on YouTube. For example, Jason's Cat Boarding Emporium 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 TARGET YOUR ADS ON YOUTUBE

Geotargeting enables you to deliver your ads directly to people near your local business, making it one of the most exciting features of YouTube advertising. Accordingly, select your Geotarget (e.g., United States, or drill down to a specific city or state). You do this by being at the Campaign level and selecting *Locations* on the left. For example, since I am only interested in people who live in San Francisco and have cats, I could target cat videos on YouTube. However, by setting the geotarget to San Francisco, only people who are physically present in San Francisco would see my ads. This is a fantastic feature of YouTube advertising, as you can have your cake and eat it too – meaning you can target vast video types (e.g., "cat videos") but also very narrow locations (e.g., "San Francisco").

Mobile Bid Adjustment

You can also control your mobile bid adjustment on YouTube to determine whether you want to run ads on phones and/or tablets. Once you've created a Campaign, click on *Devices* on the left and configure your device targeting by setting bid adjustments up or down. An example here might be a probate attorney who would assume that the most serious people would be watching her videos on their computers, so she would set a bid adjustment of-100% for mobile. If you think there is a strong pattern between mobile, desktop, and tablet, this is yet another helpful YouTube targeting refinement.

With the rise of YouTube shorts (vertical video), you can easily target mobile users by bidding out desktops in the device settings.

Target 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 Google Ads. Click into your Ad Group on YouTube, and you'll see targeting options on the left under "Audiences: and "Content." Do not mix and match targeting options, as it generally doesn't work well and makes it difficult for you to understand which option works best. Let's review targeting options.

Audiences. Here, you will see *Search* | *Browse* at the top. *Search* means searching by the attributes of your audience. Click into *Browse*, and you can browse by category:

Who They Are. This is demographic targeting based on attributes such as Parental Status, Marital Status, Education, and Homeownership.

What their interests and habits are. These are "affinities," such as whether they're into banking and finance, beauty and wellness, food and dining, etc.

What they are actively researching or planning. This refers to "in-market audiences," such as people who are "in the market" to buy a house or a car. If relevant to you, this is one of the best targeting options.

How they have interacted with your business. This leverages your remarketing audiences via Google Analytics. So, for example, you can "tag" people who visit your website and then show them your video ad as they browse YouTube videos. You can also expand to "retargeting" using Google AI to reach people "similar" to those who have already visited your website. Learn more about remarketing (now called "data segments") on Google / YouTube at **https://jmlinks.com/57p**. If you have sufficient web traffic, **remarketing** is one of the most effective ways to target YouTube video ads.

Your Combined Audiences. This is a new feature that allows you to use "And" statements to combine any of the above features. I do not generally find this effective, as I prefer to keep a clean targeting idea for each ad group.

Audience Manager. You can click into "Audience Manager" to create customer segments that you then can attach to any YouTube ad group. New for 2026: you can create a "custom segment" based on keywords, which are both the keywords users enter on Google and the ones that they enter on YouTube. This is a more targeted approach to keyword searches than "Keywords" as listed below, as it potentially means that someone searching for "dog toys" on Google can be shown your "dog toys" ad on YouTube. Learn more at **https://jmlinks.com/77e**.

Demographics. You can see and target the age, gender, parental status, and household income of the people who have viewed your YouTube advertising. Click "Edit Demographics" to access this feature.

Content. "Content" means that YouTube / Google Ads will attempt to match the "content" of the video, or the "keywords" by which a user was searching Google or YouTube to your ad. Click "Edit Content" to edit content targeting. You'll see:

Topics. These are category-by-category options that define what people are interested in on YouTube. Enter "Weddings" and you can target by that topic or drill deeper into subtopics like "Bridal" or "Rings."

Placements. This is unique on YouTube. You can find videos or channels that allow advertising and then copy/paste their URLs here. Google doesn't enable

clickable links here, so open up a new browser window and search YouTube by Channel or Video name to see what the Channel or video is about.

Keywords. Here, you can target users by keywords, which identify individuals based on the words they have searched for when using YouTube, websites, or apps. This is a looser way to target than using the "keywords" feature under audiences, as explained above.

Explore all targeting options on YouTube at **https://jmlinks.com/59g**. You can also use "exclusions" to stop your YouTube ads from running on particular channels or videos, as well as block specific keywords. Just click on "edit exclusions." I recommend a service called "Exclude Kids Channels" at **https://excludekidchannels.com/**, which creates an up-to-date list of all the children-related content. What happens is that kids watch a lot of video content, and YouTube sloppily pushes your videos in front of them (who may even click on them). But if you are not targeting children, I highly recommend you exclude all kids' content.

» EXPLORE FACEBOOK, LINKEDIN, INSTAGRAM, AND TIKTOK VIDEO

Video is more than YouTube, of course. A video can live on your website, for example. You can also place so-called "native" videos on Facebook, Instagram, LinkedIn, and TikTok, not to mention short videos on X. As you work on your video marketing strategy, please don't just think that video equals YouTube. It no longer does.

With that in mind, I will now revisit each platform. However, before I do that, let's discuss some commonalities across platforms.

1. Video is the fastest-growing content type across all social media platforms.
2. Each platform (Facebook, Instagram, X, YouTube / Google, TikTok) tends to favor "native" video, that is, video hosted on its platform.
3. All platforms, including YouTube, offer video as a "share" path, allowing consumers to share videos with each other. However, YouTube alone dominates the "search" path, as when a consumer is proactively searching for a video explaining "how to tie a tie." TikTok is emerging as an alternative to YouTube / Google search, as users increasingly search for video content on TikTok.
4. Videos that get shared across all platforms tend to feature emotional, shocking, counterintuitive, or other engaging content. The more emotional, counterintuitive, and shocking a video is, the better it performs.

5. All platforms reward videos that spur engagement as measured by views, comments, shares, and "watch time."

The three significant differences between YouTube and the offer platforms are thus a) that only YouTube has videos that really respond to user proactive search queries, b) only YouTube has an easy-to-use repository format so you can have a Channel as a place to store your videos permanently, and c) only YouTube offers an easy "embed" code so that you can embed your videos on your website. Some of these features exist on Facebook, Instagram, or LinkedIn (such as embed code), but they are so hard to manage that you're better off using YouTube for those purposes.

Facebook Video

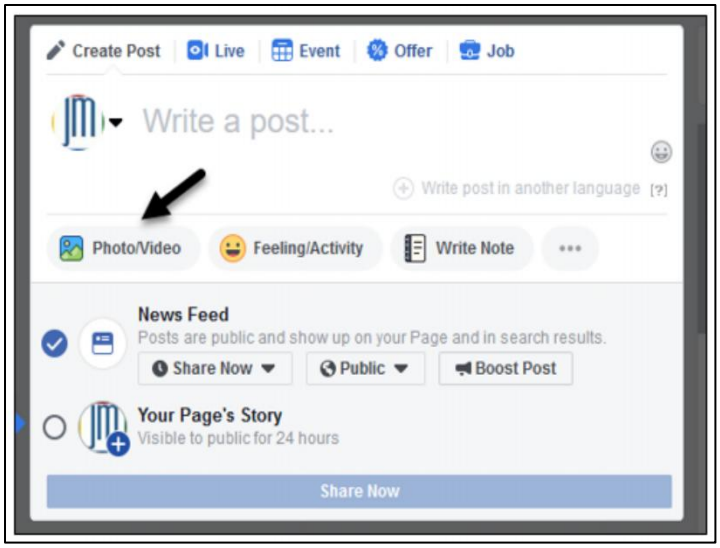
Facebook is keen to become the #2 player in video, but the way that video works on Facebook leverages only the "supportive" and "share/viral" use of video. Don't think of Facebook video as an *alternative* to YouTube, but rather as a *complement*.

Conceptually, there are two marketing paths to video success on Facebook:

> **Supportive**. Upload your video directly to Facebook as a "native" video. This use of video on Facebook "supports" your marketing message by providing content for you to post and share on Facebook. Facebook favors "native video" in its algorithm over non-native videos hosted on YouTube, so if reaching a wider audience on Facebook is your goal, native content is the way to go.
>
> **Share/viral**. A video on Facebook can be shared or even go viral. As with YouTube, emotional videos tend to 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. Additionally, you can promote the video through Facebook advertising. Facebook Live videos also have a higher reach, as promoted by the Facebook algorithm. (Learn more about Facebook Live at **https://jmlinks.com/36w** and YouTube Live at **https://jmlinks.com/36x**).

Facebook, unlike YouTube, isn't a very good storage repository for video, nor does it have the SEO / discovery use of video. (You can have a video tab on your Facebook Page, but there is no cross-channel discovery on Facebook, and the organic reach of videos is pretty poor.) Accordingly, you might consider launching your video simultaneously on Facebook and YouTube, but then, in the long term, keep only the YouTube version as your "evergreen" video.

To upload a video to Facebook, you first need to have a business Page. You will also need a video to upload, typically in MP4 format. Once you have set up a business page and have a video you want to upload to Facebook, go to that page either on the desktop or on your mobile phone and look for the "upload video" icon. Here's a screenshot from the desktop:



For example, check out the Antiques Roadshow videos on Facebook at **https://jmlinks.com/44v**. Notice how they've enabled the "video" tab on their Facebook Page.

Facebook also has a relatively new feature called "Facebook Watch" at **https://www.facebook.com/watch**. On YouTube, users can follow a Facebook Page to be alerted when new videos are uploaded. This is an attempt at direct competition with YouTube. A business page on Facebook can thus host videos that show up on its video tab and on the "watch" page. The problem is that Facebook's organic reach is poor compared to YouTube's, and few users are even aware of Facebook Watch, making it a less prominent destination website in comparison to YouTube.

Facebook is also encouraging "creators," that is, individuals who post videos that are heavily shared or even go viral, to move to Facebook (or "Meta") via its new "Creator" page type. You can learn more about the Meta Creator program at **https://jmlinks.com/44w**.

All in all, the primary opportunities on Facebook for video are the "supportive" or "share / viral" uses of video. To succeed on Facebook, you need to budget some advertising dollars to promote your videos, or many people won't see them.

Instagram Video: Stories and Reels

Instagram, of course, is owned by Facebook. So, it's not surprising that many of the opportunities are the same. Instagram favors native videos in its algorithm as well, and Instagram has gone "all in" on reels to such an extent that all videos posted to Instagram are now "reels." "Reels," of course, are the newest thing – you might consider having the same video on TikTok, Reels on Instagram, and Shorts on YouTube, as all three have the same vibe.

As on Facebook, the main reach is either people who already follow you on Instagram or videos that "go viral" due to lots of social sharing. It isn't yet a significant competitor to YouTube for long-term video hosting or discovery. Note as well that on both Instagram and Facebook, brands can have "stories," which are daily video summaries of events and highlights. Learn more about Facebook stories at **https://jmlinks.com/44z** and Instagram stories at **https://jmlinks.com/45a**. Learn more about Reels at **https://about.instagram.com/features/reels**.

LinkedIn Video

LinkedIn is the latest social platform to embrace video. Obviously, the personality of LinkedIn is more serious, professional, and B2B-oriented, so the videos that will do well on LinkedIn are going to fit its unique culture. The structure and setup are very similar to Facebook, so LinkedIn isn't a stable repository for video, but rather a network for distributing video to your existing users. Videos will show in their news feeds, and if a video is controversial, emotional, or counterintuitive enough, it has the chance to "go viral" and get shared by people on LinkedIn.

LinkedIn seems to favor "native video" over YouTube-based video, so – again – you're better off uploading video directly to the platform.

Once you have a video in MP4 format, log in to your LinkedIn personal profile or your LinkedIn company page. Click on the "video" link and upload your video.

TikTok Video

Like YouTube, TikTok (**https://www.tiktok.com/**) is primarily a video content platform. Since we cover it in the next Chapter, suffice it to say it's a huge deal. I would not shortchange TikTok by thinking it's "just for teens" or "it's just silly videos." In fact, if you're going to invest in vertical video for Instagram, then you already have the digital asset you need for TikTok. Don't ignore it; it's going to be big(ger) than it already is.

» MEASURE YOUR RESULTS

Once your ads are live on YouTube, you can evaluate their performance. Click into an Ad Group. Then, click on "Audiences, Keywords, and Content." Here, click on

Audiences to learn characteristics about the audiences reached.

Locations to learn where your viewers were physically located.

Content to see content excluded from your ads.

Click up to "Insights and Reports" to see other data points. Click "Brand Report" to see data on demographics, formats, and devices. Click "When and where ads showed" to see placements (Channels and videos where your ads appeared).

You can also go into Google Analytics to view clicks coming from YouTube to evaluate what happens "after the click." The easiest way to do this is to find the "Acquisition Report" within GA4 and then look for YouTube as a source. Within your YouTube Channel, you can click on *YouTube Studio* > *Analytics* to browse information about your videos. One of the most critical datasets is "How viewers find you." Click into this for your Channel or a particular video to learn the discovery paths taken by your users.

You can also drill down into an individual video to view key performance indicators, including watch time, view duration, views, geographies, genders, traffic sources, and playback locations. Click into a video and then select "Overview," "Reach," "Engagement," and "Audience" to learn about how users discovered the video and how they interacted with it once they started watching.

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.

Traffic Sources. How people found your video. Click on "top traffic sources" to view the actual search keywords, "external" to view referrer websites, "suggested videos" to view related videos that generated traffic. If you click "YouTube Search," it will show you the keywords users have input to find your

video. If you click "Suggested videos," you can see which videos preceded yours, and thus your video became a "suggested video" to that one.

YouTube is very keen on watch time, so click on "Average View Duration," and YouTube will show you your video, and the user's watch time will spike or drop off as you watch the video. This is an advantageous way to learn what works and what doesn't in terms of user engagement. Google owns YouTube; not surprisingly, you can use Google Analytics to track what happens after YouTube sends traffic to your website.

»» CHECKLIST: YOUTUBE ACTION ITEMS

Test your knowledge of YouTube! Take the *YouTube marketing quiz* at **https://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, especially which type(s) of videos make the most sense: ❑ supportive ❑search/discovery ❑ viral / sharing or ❑ subscription.

❑ Set up your **company channel.** If you see opportunities on YouTube, set up your company channel, including a 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 a "**Channel 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.

❑ **Identify** competitors and companies-to-emulate, including their channels and most successful videos. Ask ChatGPT to "reverse engineer" their content strategy and apply it to your own marketing goals.

❑ **Brainstorm individual videos.** Take a keyword theme or concept and brainstorm a video from start to finish. Ask ChatGPT for help, including assistance with constructing the basic storyboard for each video.

❑ **Measure** your **results** in ways such as video views, thumbs up / down, comments, and the growth of your channel subscribers. Use YouTube cards or

call-to-action overlays to direct traffic from YouTube to your website and track conversions, such as sales, that originate from YouTube.

❑ Consider **Facebook, Instagram, TikTok**, and **LinkedIn** as alternatives for video. Don't think in terms of "either/or." Your videos (especially vertical formats) can work on different platforms. Take your video content and "repurpose" it across platforms in both horizontal and vertical formats.

Check out the **free tools**! Go to my *Social Media Marketing Dashboard* > *YouTube* for my favorite free YouTube tools. Just visit **https://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. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), and click on the link to the "YouTube Marketing Plan." By completing this plan, you and your team will establish a clear vision of what you want to achieve through YouTube.

10
TIKTOK

TikTok is the most innovative social media platform since the creation of Facebook. TikTok has "cracked the code" to allow regular users to create videos easily via their phones. Creating a video for TikTok is easy, fun, and fast. TikTok has perfected the concept of a "**recommendation engine**." Yes, people want to see what's going on with friends, family, and brands that they "follow." (That's what Facebook is for). But arguably, many more people want to "be entertained." They want quick "snackable content" that is funny, provocative, and entertaining. TikTok gives cat lovers more cat videos, dog lovers more dog videos, and Cardi B (*@iamcardib*) fans more Cardi B content. TikTok offers a clean, easy-to-use, and "passive" interface, compared to the cluttered mess of Facebook or even Instagram. TikTok makes it easy, fast, and fun to produce and, more importantly, consume snackable video content.

If you don't already have TikTok on your phone, download the app, follow the prompts, and spend some time "liking" videos that interest you and "swiping through" videos that do not interest you. Before you can say "Chinese Communist Party" (since TikTok is subject to Chinese control), TikTok will serve you addictive video after addictive video. Soon, you'll join the nearly one billion monthly users on the platform who not only consume videos but are enticed to "join in the fun" by creating quirky content themselves.

TikTok was the most downloaded app of 2025 at 773 million downloads worldwide.

Let's get started!

TO-DO LIST:

- » Explore How TikTok Works
- » Search TikTok and Identify Accounts to Follow
- » Inventory Companies on TikTok
- » Explore Content Opportunities
- » Master Technical Features
- » Set up a TikTok Shop

» Measure Your Results

»» Checklist: TikTok Action Items

»» Deliverable: A TikTok Marketing Plan

» EXPLORE HOW TIKTOK WORKS

TikTok, like other social platforms such as **Instagram**, is set up so that users and brands have accounts, and then other users or brands can "follow" them at the account level, as well as like, comment, and share videos. Like **YouTube**, TikTok is video-only. TikTok is unique, however, especially in the wealth of **user-generated content** on the app, the conversational back-and-forth of much of its content, and how the algorithm feeds addictive content to users. As TikTok combines the best of Instagram with the best of YouTube, it's helpful to compare/contrast TikTok with Instagram and YouTube to orient yourself on how the platform works and where the marketing opportunities lie.

First, download the app from either the Apple App Store or Google Play. Like Instagram, TikTok is primarily used on phones. Like Instagram, you can have either a user or a "professional" (business) account. Set up a business account to access better analytics. Like Instagram, you can access TikTok on the desktop at **https://www.tiktok.com/** after you first create an account on your phone. However, like Instagram, it is primarily used on mobile devices. It's phone-centric.

Here are key structural features of TikTok:

TikTok is a True Social Media Platform. Unlike Snapchat, which is more of a messaging platform, TikTok is a truly social platform. Users find and follow each other, and if User A posts something to their TikTok account, then User B might see it in their feed (and vice versa).

TikTok is Open. Like Instagram or YouTube, pretty much anyone can follow anyone. That's the point. It's not about "secret friends" and "you must like me before you can talk to me," as on Snapchat or Facebook. It's more about being *seen*, like X or Instagram. TikTok is a profoundly public and open 24/7 platform for sharing "fun" videos.

TikTok is Video-Centric. Like Reels or YouTube, TikTok is 100% video only. In this way, TikTok is exactly like YouTube.

TikTok Is One Link Only. Like Instagram, TikTok's goal is to keep users on the platform, so you cannot share any links other than the one and only "link in bio."

TikTok's Culture is Show Offy. TikTok is full of FOMO (fear of missing out), as users rush to jump on trends and strive to reach high video counts. It's not just the content *consumption* that goes viral on TikTok. It's the content *creation* – and that is truly unique.

Here are two significant differences between TikTok vs. Instagram. First and foremost, TikTok is more of a "**recommendation engine**" than a "social network." Whereas Instagram still has one foot in the "social media" idea of following friends, family, and brands (yet is clearly moving towards being a recommendation engine), TikTok is nearly 99% about recommendations. Yes, you can "follow" and "like" content, but what shows in your "for you" feed is generated more by the recommendation engine than by follow / follower patterns. This is the key differentiator of TikTok: its recommendation engine is the best in the business.

Secondarily, whereas Instagram is increasingly cluttered (due to its ownership by the poorly focused Meta corporation), TikTok is a video-only platform. It's laser-focused on being the "fun" video platform, where creators post videos, and users "lean back" and are passively "entertained." TikTok is doing so well with young users that Zuckerberg and his team have even mentioned it by name as a significant competitive threat in recent earnings calls!

TIKTOK IS A RECOMMENDATION ENGINE

In simple terms, the content on TikTok focuses on engagement. TikTok seeks to "addict" users by showing them more and more content that they find engaging. Every time a user "likes," "comments on," or "watches" a video, the algorithm is lurking in the background, cataloging and analyzing user behavior. Learn more about how the TikTok algorithm works and what kind of content you should produce at **https://jmlinks.com/77f**. Note that this is different from the "Discover" page, which can be accessed by clicking on the "Discover" magnifying glass on the app. (Some people may not see the "Discover" icon, but only the "Friends" icon, however.)

Here's the bottom line. If you are a dog person and enjoy commenting on, watching, or just browsing dog-related videos, you'll likely see more of them. If you are a cat person, ditto. Suppose you are a Democrat, ditto, if you are a Republican, ditto. Suppose you like dance videos, ditto. If you like conspiracy theories, ditto. Users quickly go down a rabbit hole of **addictive content that reinforces their predispositions and interests**.

On the other hand, the recommendation engine spices up content with new and weird stuff unrelated to interests – trending videos, trending sounds, hashtags, etc. – so that the feed doesn't get boring. It's the perfect balance of "oldies but goodies" when it comes to user interests, plus "new and trending" content. It's perfectly designed to engage users, with many teens spending two to three hours per day, and the average time spent on the app is fifty-two minutes. Whether this is beneficial for society is a separate question. Still, as marketers, we must recognize that TikTok – more than any other platform – prioritizes engaging, dare I say, "viral" content as our primary marketing goal.

Secondly, TikTok is **conversational** in a way that Instagram is not. And not just among users who know each other, but across users who are not acquainted. While users can create an account and post "stories" about their lives, most users are engaging with trending songs or sounds, trending controversies or ideas, or building themselves up as superfans and influencers. There are even **duets** between videos, and users can embed comments in a video and comment on those comments. A good way to think about TikTok is that it is a truly "**social conversation**" conducted in video form. TikTok also connects strangers to strangers, making it similar to X in its openness and conversational vibe. But so far, it's not negative and snarky like X: it's fun and friendly.

If Instagram is "Here is my life, check me out," TikTok is "You said this-or that?," "Well, I respond this-or-that," "You did X," "Here is me imitating you doing X," and so on. It's like a dance contest that morphs into a contest for humor, conversation, and trending topics. TikTok is a video conversation as much as it is a social platform. TikTok, in essence, is the world's first **social video** platform.

Third, TikTok is **AI-centric**. Many users don't even check who they are following or do much more than "like" or "swipe" videos. The artificial intelligence (AI) algorithm determines what users like and shows them more of that, regardless of whether they are following that user or not. Sure, follows and followers still exist, but most of TikTok is led by its AI. For this reason, "riding the trend" is as essential, if not even more essential, to success on TikTok than increasing your follower count.

TIKTOK IS AI-CENTRIC

What about YouTube? TikTok, like YouTube, focuses exclusively on video content. It has the four basic uses of video:

Supportive. You could conceivably use TikTok videos to "support" your brand, as when a cooking channel puts out short TikToks about how to make a quick

recipe or a quick cooking tip. Or how a celebrity brand might show insights into their daily life as they do on Instagram or Facebook Stories.

SEO. TikTok is not easy to search, but users can follow hashtags and content themes. This aspect of TikTok – TikTok like a search engine – is growing fast, especially among Gen Z, and it is replacing YouTube as the "go-to" repository of video content. TikTok is YouTube's first real competitive threat.

Viral / Sharing. Here, unlike Instagram or YouTube, TikTok is a huge platform for sharing viral content. Users piggyback on trending sounds, songs, hashtags, ideas, controversies, etc., and then both the videos themselves and the "theme" go viral. In fact, the "discover" tab on the app is literally about trending hashtags, and the app has built-in share capability not just for other users on the app but for different platforms like Instagram. TikTok is cleverly utilizing other social platforms, such as Facebook, X, and Instagram, to expand its audience and attract users from those platforms.

Subscriptions. Again, like YouTube, individuals, creators, and brands try to build out "addictive" content so that users a) subscribe to their TikTok accounts and/or b) see and re-see their content via the "recommendation engine," which realizes that you "like" to see videos by so-and-so. Not surprisingly, TikTok has a vibrant "influencer" marketplace where brands can purchase endorsements at **https://creatormarketplace.tiktok.com/**.

Although videos on TikTok are shot in "vertical format" and are generally short (< 1 minute, though users can now upload long-form content), the principles of good storytelling apply to TikTok as they do to YouTube. **Emotions** (especially humor, controversy, trending topics, and outrage) drive viral shares, plus stuff that is just plain funny. Humor is the #1 emotion on the platform, followed by controversy/outrage and a general sense of "surprise" or "this is counterintuitive." Each video needs to have a powerful and fast "hook" in the first few seconds, tell a quick story with a rising action, climax, and falling action, and then prompt users to "like," "comment," or "share" the video to feed the algorithm. "Hacks" and "commentary" on issues are also rapidly growing content on the platform.

AI PROMPT. Since ChatGPT already knows your brand, prompt it as follows: "Since you know our brand and target buyer personas, identify five good content marketing strategies for us on TikTok. Give us the big picture first, and then ideas for two or three specific videos."

The best way to understand TikTok is to start using it and identify creators and brands to follow. We now turn to this task.

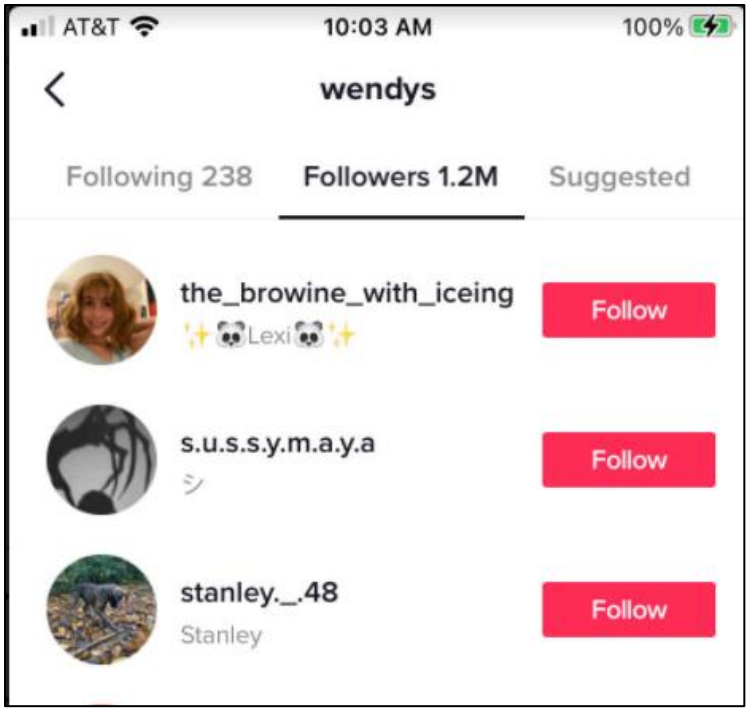
» SEARCH TIKTOK AND IDENTIFY CREATORS AND BRANDS TO FOLLOW

As on YouTube, TikTok has the following sorts of users:

> **Average Users.** These are individuals who primarily view videos and consume content without creating their own. Or, they produce videos but mainly for friends and family, and none of this content "goes viral" or becomes "massively popular."
>
> **Creators**. These are people-as-brands, that is, individuals who utilize the platform for personal branding. Often, they are actors, musicians, or comedians. Many of my favorite content creators are comedians, for example - **https://www.tiktok.com/@tuckercomedy** or **https://www.tiktok.com/@jessejosephgeneau**. But others, such as Rachel Ray (**https://www.tiktok.com/@rachaelray**) or Shaun T (**https://www.tiktok.com/@shaunt**) use the platform for "how to" content such as cooking or getting in shape.
>
> **Brands**. These are brands such as Chipotle (**https://www.tiktok.com/@chipotle**) or Wendy's (**https://www.tiktok.com/@wendys**) that have fully embraced the platform and are cleverly using it to reach their target demographic (young people). Not surprisingly, most of the top brands on TikTok are consumer- and youth-oriented.

As on Instagram and YouTube, you can easily see who follows whom on TikTok. Visit an account on the app and click "following." (Note: Some features are only available on the mobile app version, not the desktop version.) Just go to an account and click on "followers."

Here's a screenshot of who is following Wendy's:

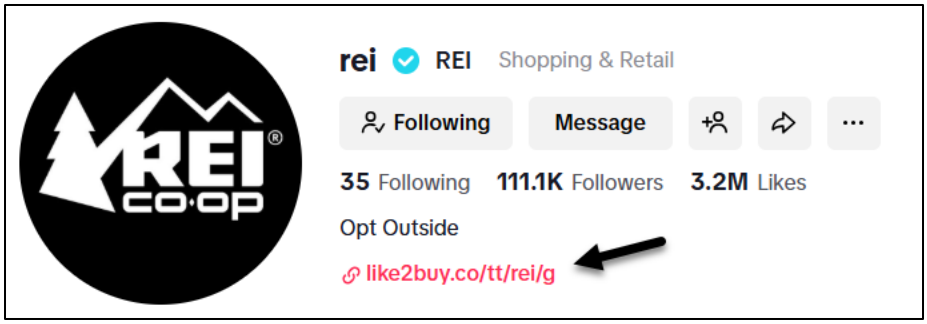


You can also click into any follower account and see how many people they are following vs. how many people they follow, a good metric for their brand strength, just as on Instagram or X. Here's a screenshot of Wendy's:

Wendy's thus follows only 402 accounts, is followed by 2 million, and has received 12.9 million likes on its videos with a 5% engagement rate (visible if you enable VidIQ, which is beginning to service TikTok as it does YouTube). Like Instagram, you have a profile picture, a short text bio, and a link. That's about it in terms of account optimization. Wendy's has a "blue check," which is a status symbol indicating that this is a verified account.

Note that, as on Instagram, only one link is allowed. Wendy's has its main URL in its bio. Other brands, such as REI, use services like Curalate or Link.Tree to make it easier

for users to transition from a single shareable URL to multiple ones. Here's a screenshot of REI:



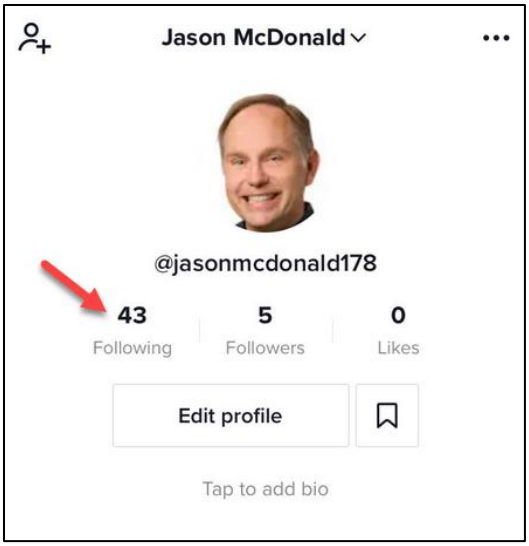
Finding Competitors and Companies-to-emulate

On TikTok, as on all social platforms, you want to identify people and brands that are doing a good job so you can "reverse engineer" their content marketing strategies. It's not hard to search TikTok. Use the **search feature** on the app and input the name of a brand (or competitor). Then follow them on your own account (not your business account), and you can stealthily see what they are up to on TikTok. Alternatively, you can search by keyword. Once you enter a keyword or brand name, you then get a response screen with "Top," "Users," "Videos," "Sounds," and "Hashtags" across the top. To find the brand, generally, tap on "Users."

IDENTIFY AND FOLLOW "COMPANIES-TO-EMULATE" ON TIKTOK

Once you build a list of competitors and companies to **emulate** on TikTok and start following them, remember that TikTok is algorithm-centric. You will not always see the content of accounts you follow on your primary feed. Instead, as a "market researcher," you need to tap into your profile and then tap on "following" to find brands you are following.

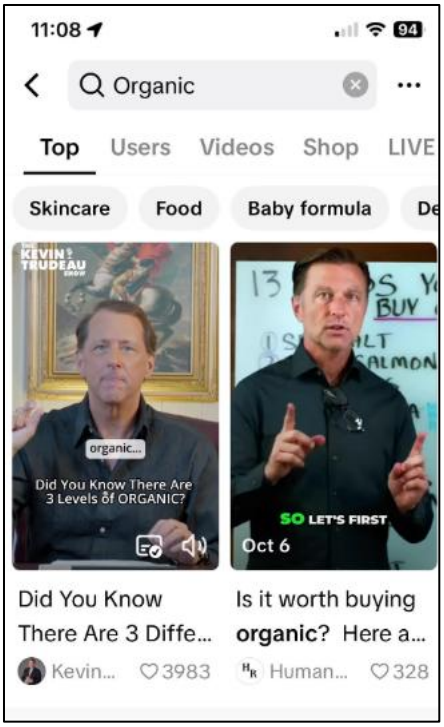
Here's a screenshot:



By clicking on "following," I can browse the creators and brands I follow and see what they are up to, rather than depending on the algorithm, which will strongly prefer content that I have heavily engaged with.

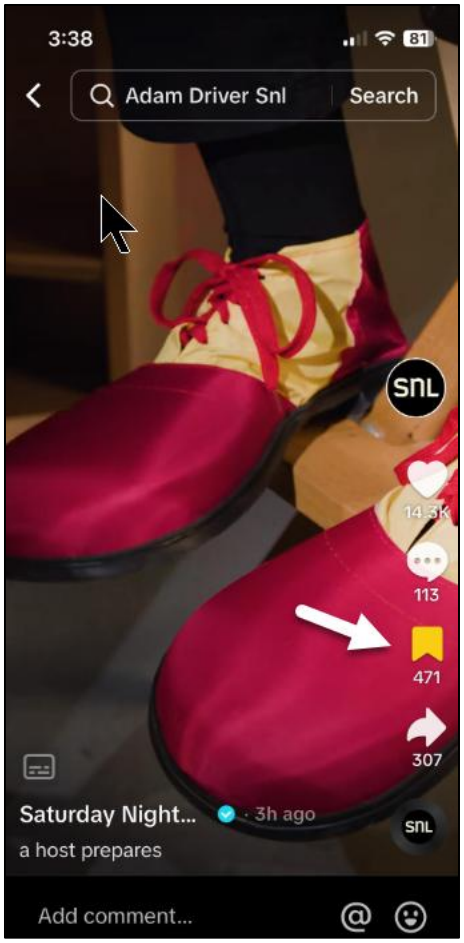
Search by Keywords

You can also search by keywords or themes to discover creators, brands, trending topics, or hashtags. Open the app, tap on the "discover" magnifying glass at the bottom, and type in a keyword or theme into the search bar. Here's a screenshot of the keyword "organic" on TikTok:



Again, you can tap across the top for "Top," "Users," etc., to drill into categories. New for 2026 is the "Shop" tab, as TikTok is heavily promoting native shopping. Find relevant brands, creators, hashtags, and more, and follow them on your account. **Hashtags** are very popular on TikTok, and you can even "follow" a hashtag. Click on it and click "Add to favorites." The same goes for "Sounds" and "Effects." As you find them, tap into them, and add them to your favorites.

As you research what's going on on TikTok, "favorite" videos from your competitors and companies-to-emulate. Click on the small icon that resembles a bookmark. Here's a video from SNL on TikTok. After I press and hold on it, I can click "Favorite" (the bookmark icon in the lower right) to bookmark it to my favorites. Here's a screenshot:



Once added to "Favorites," I can return to this video to rewatch it (and "reverse engineer" the marketing magic in it) by clicking on my profile and then the "bookmark" icon in the middle. I can also click on "liked" to see videos that I "liked." You can also download the video to your phone. And, if you are working as a team, you can copy the URL to your desktop and email it to your team. For example, the URL of a famous video by Chipotle, titled "Sending a Burrito to Space," is available at **https://www.tiktok.com/@chipotle/video/6888800963797323013**.

In this way, you can be a sophisticated market researcher and keep an eye out for content creators and content that you may want to imitate. Don't try to "reinvent the wheel" on TikTok; instead, pay attention to what others are doing and what is getting engagement.

"REVERSE ENGINEER" WHAT'S WORKING FOR BRANDS ON TIKTOK

Because TikTok is also available on the desktop, you can log in to your account on the desktop and manage many of the features there as well. You can search for interesting videos there. On Google, you can use the **site:tiktok.com {keyword}** format to search by competitor or brand name, keyword, or even hashtag, thus using Google to search TikTok for content. For example, to see the search for "burritos" on TikTok, go to **https://jmlinks.com/55q**. You can substitute your own keyword and use Google as a quick way to search TikTok on the desktop.

> **AI PROMPT.** "Hey, please identify five competitors, five companies-to-emulate, and five influencers who would be relevant for our company. For each, please give the account handle and a summary of the content strategy."

» INVENTORY COMPANIES ON TIKTOK

To succeed at TikTok, you should a) become a heavy user of TikTok, and encourage your friends, families, and colleagues as well – by using TikTok, you'll be better able to market on TikTok, and b) reverse engineer competitors and companies-to-emulate. Follow brands, influencers, super fans, public figures, and others, and consider what they are doing and why from a marketing perspective.

Here's a pro tip. Don't just rely on the algorithm to serve content to you. This will be somewhat misleading. Instead, follow content creators, brands, competitors, and relevant influencers (in your personal account). Then, as you log in to the app, click on your *profile* > *"Following"* and browse each account. In this way, you can be sure to see what they're posting, and you can check views, likes, comments, and shares to measure engagement.

Because TikTok is relatively new and weird, however, you may find that zero competitors in your industry are using it or using it effectively. Even some big brands are still absent from the platform! If your competitors are not on TikTok, that may actually be good news for you, as the early TikTokker gets the views.

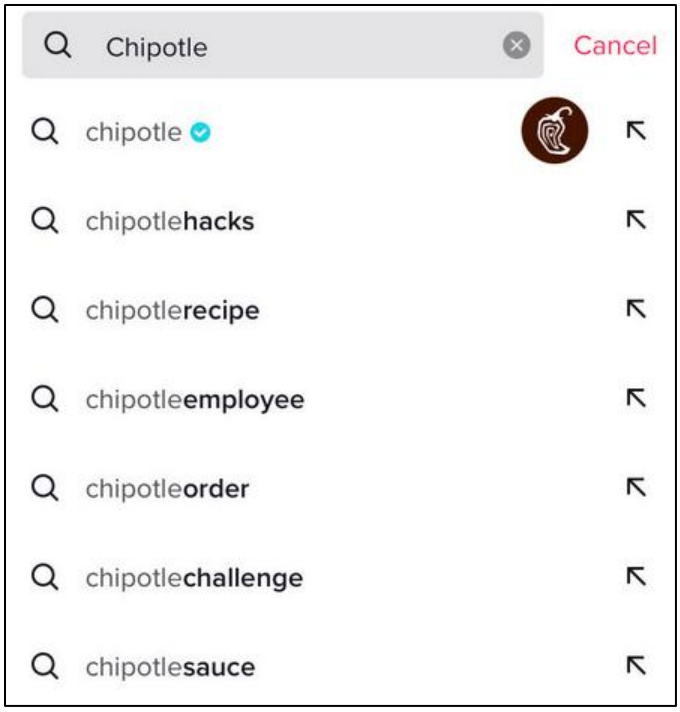
At the end of this exercise, you should have identified brands, content creators, influencers, hashtags, videos, and even sounds that are relevant to your company. I recommend following these in your (private) personal account vs. your (public) business account, as "who you follow" is visible to the outside world, and you don't want your brand account to be seen as promoting the competition, or just plain weird. Your goal is to "reverse engineer" what others are doing, take that knowledge back to your own TikTok strategy, and implement it. As they say, "Good writers borrow, and great writers steal."

Examples

Let's look at a few companies-to-emulate, starting with @Chipotle (**https://www.tiktok.com/@chipotle/**). At a structural level, look at their brand page. You'll immediately notice there isn't a lot that one can do at the account level. You see a brand icon for the profile picture, a text summary stating "also known for our napkins," and a single, solitary link allowed by TikTok, plus a link to the Chipotle app. Here's a screenshot:

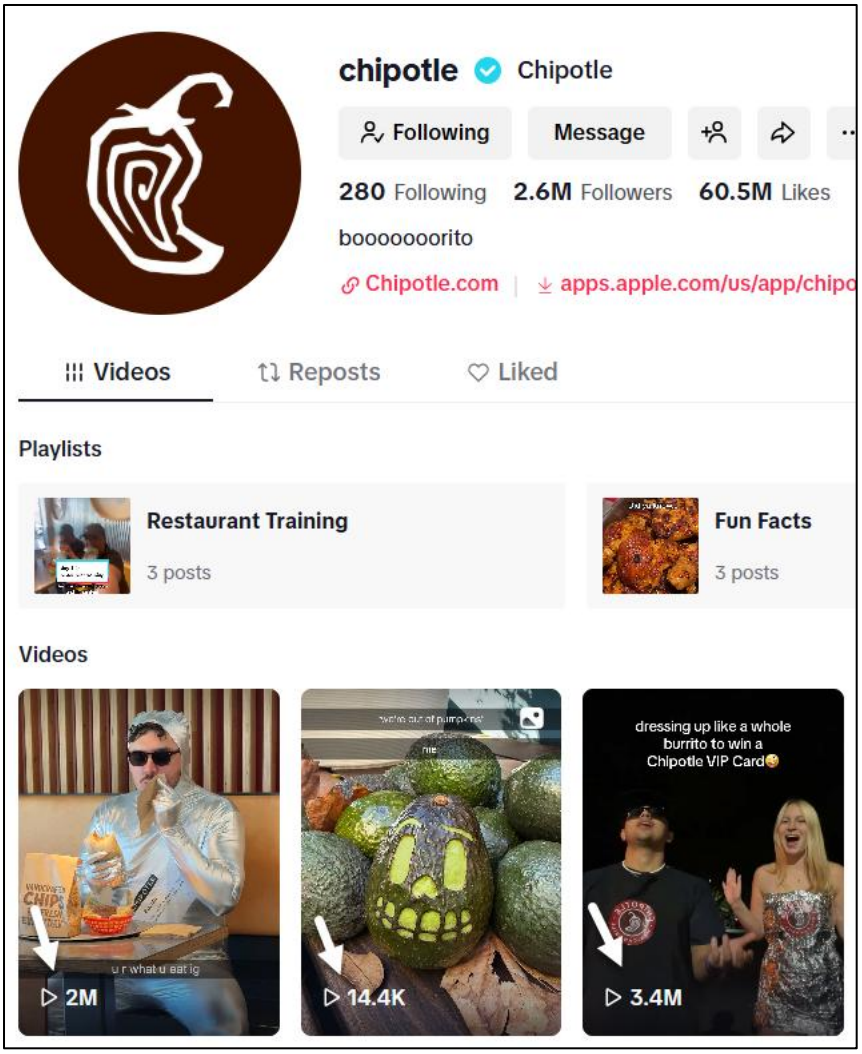
You can see "following," "followers," total "likes," a "bio," a link to their website, and (for apps), a link to their app download page. The "messages" icon allows users to "message" the brand via the TikTok app.

That's about it. The real engine of TikTok is **content** – videos produced by the brand, including content "nurtured" by the brand via hashtags, contests, challenges, and "piggybacking" on trending content. Go to the search feature and type in the brand name, i.e., "Chipotle," and look for related content. This is an easy way to view user-generated content. Here's a screenshot:



You can then tap into these terms and see related content. Often, content such as "chipotlechallenge" or "chipotlehacks" has been "nurtured" by the brand. Don't assume that this all "went viral" all on its own. Chipotle is a smart brand that has fostered a user-friendly environment on the platform, and so can you.

Next, within a brand channel, you can view the video count. Note: video view counts are not readily viewable on the video itself. Rather, look at the brand channel, and then you will see the view counts. Here's a screenshot of Chipotle's account on TikTok showing video views:



Next, click into a video to view more engagement data. For example, here's a video on how to make Chipotle guacamole:

You can see that it has 15K likes, 238 comments, and 3,494 bookmarks. This, in combination with the view count, indicates the level of engagement with the video. You cannot, however, see "watch time" (i.e., how much of a video people watched), and this metric is likely the key to the TikTok algorithm.

As you work through a brand, please pay close attention to the videos on their channel and categorize them accordingly. Chipotle promotes many videos that are a) influencers or famous people, b) challenges or contests, c) silly user-generated content, such as users who are pleading with Chipotle to give them free burritos for life. Click into the "Liked" tab to see which videos your company-to-emulate has "liked."

Here are some other brands that are excelling on TikTok. Check them out with an eye to the "party with a purpose" aspect of their TikTok marketing strategy.

Zach King (**https://www.tiktok.com/@zachking**) – note that some of his videos cross into influencer marketing, in which he "endorses" a brand. For example, watch his video supporting Grubhub.

Crocs (**https://www.tiktok.com/@crocs**) – the shoe type that will never die.

Jimmy Fallon (**https://www.tiktok.com/@jimmyfallon**) – where does the comedian end and the brand begin? Fallon is a brilliant example of a content creator who "gets" what's so amazing about TikTok.

Tuyen (**https://www.tiktok.com/@lifewithtuyen**) – This is a "recipe" or "foodie" brand that builds, cooks, and shares super yummy food while showing you how to cook.

Wendys (**https://www.tiktok.com/@wendys**) – another consumer brand that, like Chipotle, is excelling on TikTok as they do on X.

Sugar Hero (**https://www.tiktok.com/@sugar.hero/**) – a consumer-facing (personal) candy brand that is crushing it (pardon the pun). Notice the "how we make it" theme in many of the videos.

Sticky Lollies (**https://www.tiktok.com/@stickyaustralia**) – another consumer-facing candy brand that is sticky. Similar to Sugar Hero, but in this case, a true brand, and also heavily focused on the "how we make it" theme.

As you identify companies-to-emulate and competitors, focus on those videos that generate the highest engagement. Ponder why a particular video did so well; ask ChatGPT to analyze the video, and brainstorm how your brand might do similar

content. "Content marketing" is the essence of success on TikTok as it is "all about the feed" and the "recommendation algorithm."

> **VIDEO.** Watch a WaPo video on how the TikTok algorithm works at **https://jmlinks.com/77g**.

As you look at your industry – competitors, companies-to-emulate, power users, influencers, hashtags, video view counts, etc. - pay attention to how much of the content strategy is "fun" and "humor" just like real consumers vs. an aggressive "buy our stuff" tone. The "buy our stuff" message takes a back seat to the "we are cool just like you teens" message. Your objective here is to examine the total package of brand content on TikTok, with an eye to how you might structure not only your account (which is relatively easy) but also your content strategy (which is where the real fun begins). Think fun, think funny, think customer-centric, think user-generated, think viral, think sharing, think visual, think video, think story, think piggybacking on trends – think, in short, like a teenage consumer. (But, as an adult, realize that adults are also massively signing up for TikTok, scaring the bejeezus out of the boring, old, and out-of-touch marketing execs at Facebook, Instagram, X, and YouTube).

On the other hand, some brands, such as *@Fentybeauty* (**https://www.tiktok.com/@fentybeauty**) (which is Rihanna's beauty brand) and *@Rusticcuff* (**https://www.tiktok.com/@rusticcuff**), do post a lot of "buy our stuff" content. They position it as fun, informative, "how to," and show-offy. Having a charismatic superstar like Rihanna as your brand ambassador helps a lot.

» EXPLORE CONTENT OPPORTUNITIES

Content, especially *User Generated Content*, is the name of the game on TikTok. The way to think this through is to blend an understanding of the technical features or opportunities with how brands leverage users to promote their brand message subtly. Let's work through some examples.

> **Trending**. "Trending" virality, as pushed not by users but by the algorithm, is the bread-and-butter of TikTok. Users and brands create their own content that is so quirky and funny that it will be found by the algorithm, and users will engage with it enough to be promoted. Unfortunately, it's hard to see all the trending and fun content. The best strategy is to be a "user" of content in your industry and watch what goes viral. Pro tip: Create a "burner" account that mimics one of your target buyer personas, liking, watching, commenting on, and sharing

content. In that way, the TikTok algorithm will suggest trending industry content to that "user." To follow generic trends, visit the TikTok creative center's special trending URL at **https://jmlinks.com/77j**.

How To's and "Hacks". This is another type of brand content. Brands such as Rachel Ray and Shaun T (food and fitness) create a lot of this type of content. If your brand is a "helpful expert," then this presents a significant opportunity for creating supportive content on the platform, but it is unlikely to go viral. Check out the hashtags #*hacks* and #*howto* as well as the @adamroseideastip channel (**https://www.tiktok.com/@adamroseideastip**) and @dadadvicefrombo channel (**https://www.tiktok.com/@dadadvicefrombo**).

Challenges. Brands promote challenges that usually require users to do something silly or fun that involves the brand. In some cases, users can win prizes. Try entering a brand name plus "challenge" via Google, as in *site:tiktok.com Chipotle Challenge* (**https://jmlinks.com/55t**). There may even be a hashtag, such as #ChipotleLidFlip, with 357 million views at **https://jmlinks.com/55u**. This type of content is probably the easiest to nurture and encourage in terms of user-generated content and sharing.

Contests. Contests can be as simple as "enter to win" or as complicated as requiring users to go through various steps. Again, search TikTok for "contests" to browse current contests and mine them for ideas. Or follow the hashtag #*contests* on the app at **https://www.tiktok.com/tag/contest**. Notice that there are two types of contests:

1. **Contests by Brands**. These are more "formal" contests where money and prizes can be won.
2. **User-generated Contests**. These are more like "challenges" in that users create, follow, and engage with contests to complete specific tasks. In this way, the difference between a "contest" and a "challenge" can be a bit blurry.

Influencer Outreach. As we see on Instagram and YouTube, influencers are 'for sale" on TikTok. So much so that TikTok has an official "influencer creator marketplace" at **https://jmlinks.com/55v** where talent and endorsements are literally for sale. If you look back at the Chipotle account, for example, you'll see quite a few cross-promotions with influencers; whether money was exchanged or not is not exactly obvious. *Sorry FTC regulators* – you are way behind the app!

The types of content listed above all have their counterparts on other social media platforms. The uniqueness lies in the short-form, vertical video format and the quirky,

humorous tone that is characteristic of TikTok. TikTok is not the place for horizontal videos nor for "serious" videos such as "Dear Future Mom" or "#*Always* Like a Girl," as we saw on YouTube. Brands keep it short, funny, and viral. For the official TikTok resource on creating content, visit their awesome "Creator Portal" at **https://jmlinks.com/76c**. For more creator ideas, see their "Creator Hub" at **https://jmlinks.com/77h**.

Rapid Fire Content Ideas

Content is king on TikTok! You need to create content around your brand that grabs users' attention, holds it, and sparks engagement, as measured by likes, comments, shares, and watch time.

Here are some "rapid-fire" content ideas:

Hook. The first few seconds of the video are critical. You must "hook" the viewer with a puzzle, a claim, an out-of-body experience, or an over-the-top "hook," either through great visuals or through great sound. **What's your hook?**

Trending Sounds. Trending sounds are as big, if not bigger, than trending hashtags. Follow the trending sounds and hop on, or – if you're a big brand – create your own sound and encourage it to "go viral." Remember that you can "see" the sound in any video in the lower right corner. Click on it and see all the videos that use that sound.

Trending Music. Music is critical to many successful TikToks, so look for trending songs, especially but not limited to top 40 hits, and embed them in your video.

Silly Statements. Another common trending sound is the latest guffaw by a major politician, a silly statement by some movie star, or a celebrity quote. Piggyback on the humor in these "quotes" as "TikTok sounds."

Contests and Challenges. Both are big; the difference is that a contest involves monetary payment, while a challenge is simply about "bragging rights." Research the hashtags #*contest* and #*challenge* to see what's going viral and might work for your brand.

Hacks. Hacks and hidden features are yet another content trend. There are numerous content ideas, such as hidden "cooking" hacks or funny "wedding" hacks, etc. Look up the hashtag #hacks for inspiration, or add your keyword theme, like #cookinghacks, #financialhacks, or #exercisehacks, to find relevant content.

Behind-the-scenes. As on Instagram Reels or Facebook Stories, bigger brands get to show us what goes on "behind the scenes," such as how a Gucci purse is made, how chocolate is made, etc. **What's your "behind the scenes" story?**

Outrage. While not as political as X, *#outrage* does have its place on TikTok. This is especially useful for political or nonprofit brands. Politics is creeping into TikTok as it replaces YouTube and X as the go-to news source for Gen Z and Millenials. (Please say a non-denominational prayer that political bitterness does not ruin TikTok as it has ruined X).

Humor. TikTok remains the funniest platform out there. It has more than its share of "stand-up comedy" type of posts, and many content creators are exclusively humorous. Have fun with your brand and leverage humor for your own content as well as the UGC content of your customers.

"Man bites Dog." This is news. "Dog bites man" is not. What's "**counterintuitive**" about your brand story? What will make people stop in their tracks on TikTok and want to see more? Think trainwreck, explosion, or other "I can't believe you did that" type of content.

Trending Hashtags. Hashtags are big, as we have discussed, and they trend. Find and follow key hashtags and jump on them. Make your own branded hashtag. Make your own contest or challenge hashtag.

Infomercials and How Tos. Many brands create content around their brands that are shameless infomercials. *It slices. It dices. You can purchase it via the link in our bio.* Think of fun, humorous, over-the-top ways to sell your brand while simultaneously entertaining users.

Ads that Look Organic. TikTok appears to disregard FTC regulations and other brand restrictions. It's hard to see "what's an ad" vs. "what's organic." Jump on that trend with your own ad that "looks like" organic content. This is called "Fake UGC" ads. Visit the official TikTok for business site at **https://www.tiktok.com/business/**.

Superfans and Influencers. Collaborate with your most famous "fans" or reach out to "influencers." Cross-pollinate by making fun videos with "influential" people in your niche. Who are the influencers in your industry? Which ones are on TikTok?

Have fun. TikTok is the funnest platform in social media today! Don't be boring with your content. Embrace the zeitgeist of TikTok and be fun, be funny, be outrageous, be over-the-top, be a contest, be a challenge, be crazy, be dancing. But most of all, engage and motivate your customers with "great" content.

AI PROMPT. "Using what you know about our brand and target buyers, help us create a content strategy for TikTok. Identify the content themes for which we should create videos, plus a list of your best ten ideas for video content. For 'extra credit,' give us a list of how we might encourage UGC content as well."

» MASTER TECHNICAL FEATURES

TikTok has technical features such as likes, comments, tagging, and hashtags that are similar to those found on other platforms, and we have already noted that – like Instagram – it has a one-link-only policy. Like all platforms, video is primary, and "watch time" is a key part of the algorithm. However, you can only view watch time for your own account (and not that of competitors). Here are some additional technical features.

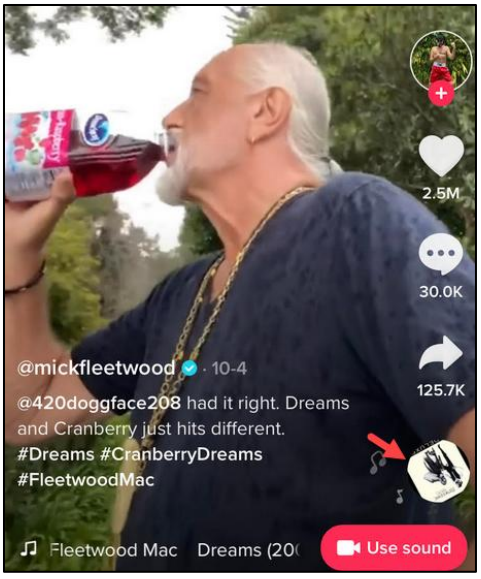
Trending Sounds and Songs

First and foremost, TikTok has trending **sounds** and **songs**. TikTok has a strong music orientation, and thus, a sound clip can "go viral." Brands can then piggyback on that sound by creating a funny video that utilizes it. For example, Fleetwood Mac's 1977 hit "Dreams" had a renewed life on TikTok as a viral hit. TikTok users were mesmerized by a young skateboarder chugging Ocean Spray juice along to the tune. Here's an example of that trend:

Note the chugging of Ocean Spray cranberry juice, and the comment by Ocean Spray (the brand). Once that went viral, brands such as Wendy's capitalized on it with their own videos. Here's a screenshot of Wendy drinking to "Dreams."

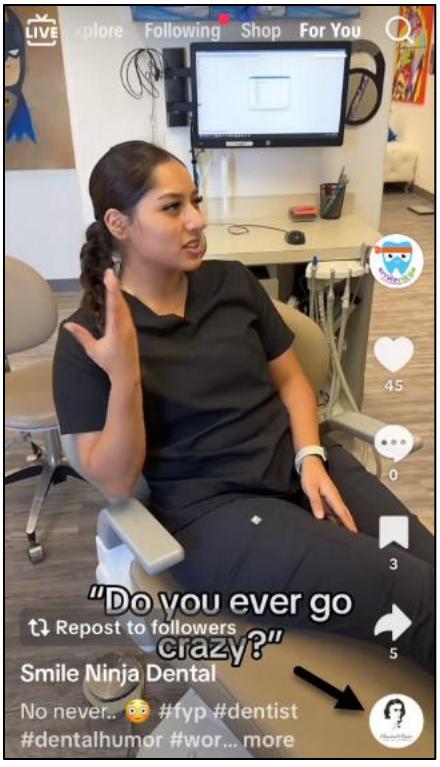
It was an example of how TikTok is "conversational" around trends. Users, brands, and some funky weirdness created a viral sensation. The takeaway is to watch for trending sounds, songs, and content, then piggyback on them with your own embedded brand message.

On the app, you can tap the bottom right spinning icon, which represents the sound, to view more videos that use this "trending" sound. Here's a screenshot:

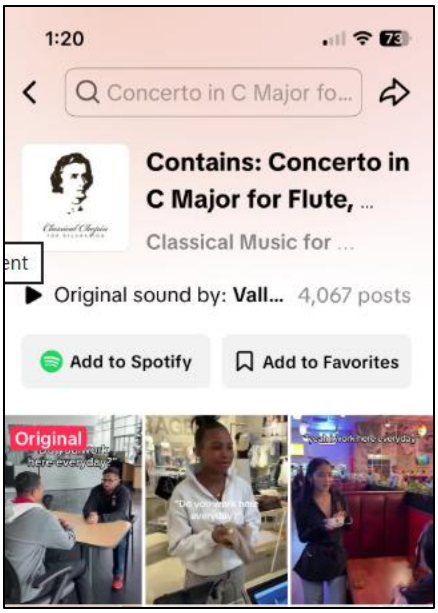


This will direct you to a page featuring other videos that also share this sound. **Sounds, on TikTok, are thus like "hashtags."** Content can be created and shared around a sound.

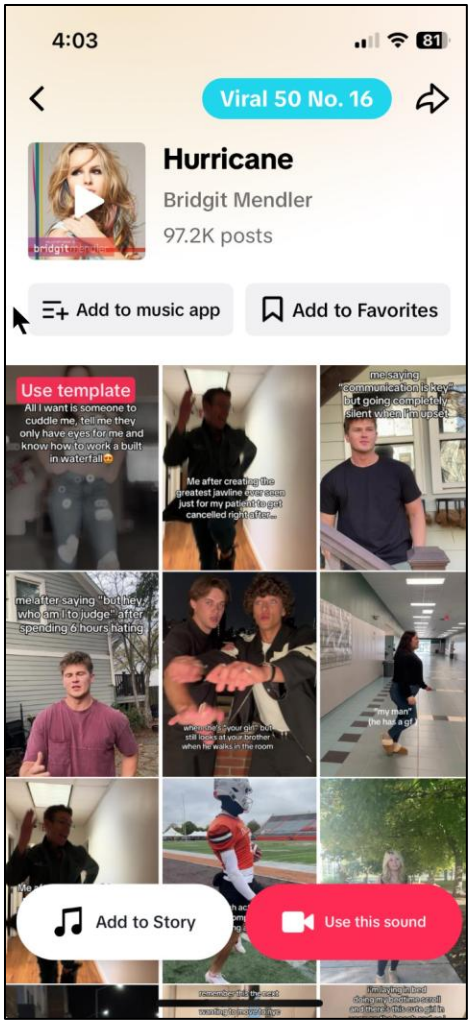
Another way to find trending sounds is to go to a video and click on the sound icon on the bottom right. Here's another example:



When you click on the sound icon, you can see ALL the videos made with that sound. Here's a screenshot of that:



Monitor your industry's content themes, competitors, and companies to emulate, and click on the sound icon (bottom right) of various videos to identify sounds with high engagement. You can tell that they do when the "sound" screen is full of videos. Here's a screenshot of a currently trending sound/song:

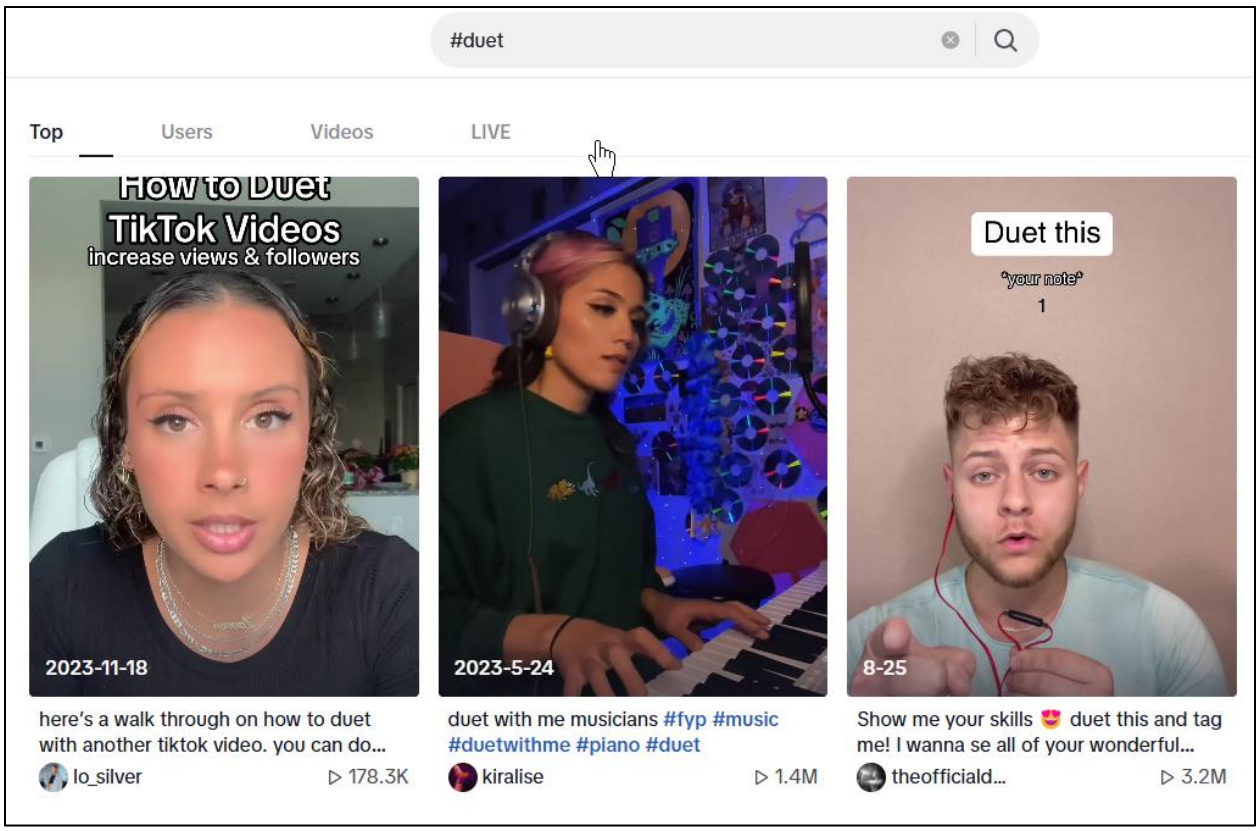


In this way, you can find trending sounds, create video content that employs this sound, and "piggyback" on that trend. You can also often see hashtags that have an interrelated sound and create content that is both a hashtag and a trending sound. You can also search by keyword and then click over to sounds to see related sounds. Inside a trending sound, swipe up to browse videos that use the sound. Trending sounds are one way that the TikTok algorithm favors content. (You can also click on "explore" to find more trending videos and sounds.)

Duets

Duets are another fun technical feature on TikTok. Here, one user talks back to another user using the duet feature. Think of it as a video conversation or a "split-screen" effect, similar to what you see on a traditional TV news show. Many duets are tagged using the

#duet hashtag (**https://jmlinks.com/55w**). Here's a screenshot of the TikTok hashtag:



The feature is so popular that TikTok has an official video on how to create a duet, available at **https://jmlinks.com/55x**. Check it out and check out some of the better duets. Then look for trending duet content and chime in as a brand.

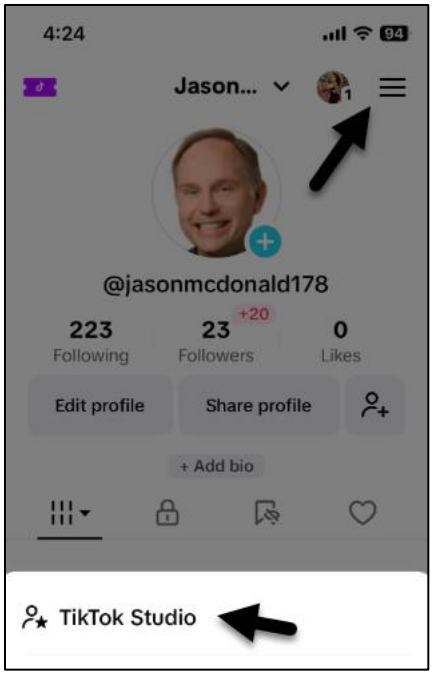
Another way to utilize TikTok is to create your own branded sounds and/or host your own branded contests or challenges centered around duets. Chipotle has done this through its "original sound" channel at **https://jmlinks.com/55y**. Thus, the brand strategy is to literally create an "original sound" and then promote content around that sound. Other fun things that brands do include responding to comments and embedding those comments in their videos with responses, similar to a duet. I would go so far as to say "Piggybacking" is a legitimate content strategy on TikTok. Ask yourself – what might you and your brand "piggyback on?" At one point, Chipotle became embroiled in a massive viral controversy over whether it had not only raised prices but also served food through the app in smaller portions than those ordered directly. It's "social media," after all, and the customers can push back! Check out the hashtag *#chipotleceo* to watch these "revenge" videos.

Other Technical Features

TikTok has several other technical features worth noting. First, there's tagging as on other platforms. By tagging an account that is "more important" than you are, you can encourage a social interaction. Second, there are text overlays. Adding text overlays to a video (such as captions) can help increase interaction as people like to both "see" and "hear" content at the same time. Third, there are comments. You can comment on a video in text, but you can also do a "video reply," thus creating a video-type of interaction. You can learn more about this at **https://jmlinks.com/56w**. As on other platforms, you can also "go live" on TikTok. You can plan an event, allow fans to book a notification, and when you "go live," TikTok will push out notifications to users. You can learn more about best practices at **https://jmlinks.com/56x**.

Business Accounts or Creator Mode

TikTok's naming conventions are a bit confusing. Be sure to enable either the "business" account or "creator mode" feature first. Then, click on your profile, and the hamburger menu will appear at the top. Look for "TikTok Studio" and click inside. It's a little hard to find, so here's a screenshot:



Inside "TikTok Studio," you'll find a cornucopia of TikTok tools, such as:

Analytics. Analytics about your account.

Subscription. Enable subscriptions to your "live" video feeds.

Creativity Program Beta. Sign up to be a TikTok creator and get some compensation.

TikTok Shop for Creator or Seller. Enable a "shop" on TikTok (See below) where you can sell stuff.

Creator Marketplace. Become an "influencer" and be paid by brands for "product placements."

Work with Artists. Find musicians and gain help with sounds or songs that will (hopefully) trend.

Tips. Let users "tip" you, i.e., pay you, during live videos. Trigger Alert: this feature is pretty gross, as in "OnlyFans" gross.

Creator Portal. TikTok's one-stop shop for creators.

Promote. Pay to increase your video views.

Artist Hub. Musicians can enhance their musical prowess on TikTok.

For your inspiration. Browse similar, trending, and videos that your followers also viewed (useful for market/content research).

This is also a good way to find trending or recommended content, against which you can "piggyback" your own videos.

» SET UP A TIKTOK SHOP

"TikTok Shop" is increasingly important. TikTok already has a massive audience of people looking for product and service tips, hacks, and ideas. The hashtag *#TikTokMadeMeBuyIt* (**https://www.tiktok.com/tag/tiktokmademebuyit**) has over 25.7 million posts!

Like Instagram, Facebook, YouTube, and Pinterest, TikTok encourages creators and brands to allow shopping. Assume that shopping will be both native and non-native on the app. On the technical side, learn more at **https://jmlinks.com/76e**. If you're already running an e-commerce website, most major platforms, such as Shopify or BigCommerce, are supported. Check out platforms that easily support TikTok Shop at **https://jmlinks.com/76f**.

TikTok Shop is a relatively new feature that is only visible on the app, not on the desktop. Here are a few brands that are using it:

BK Beauty (**https://www.tiktok.com/@thebkbeauty**).

LionLatch (**https://www.tiktok.com/@lionlatch**)

Borowood (**https://www.tiktok.com/@borowood**)

TikTok Shop has three key aspects: live shopping, shoppable video, and a store. The "store" is most like what you see on Instagram. The other two are innovative in that they blend video with in-app purchasing. Expect YouTube and Instagram Reels to follow suit quickly. That said, it's challenging to integrate product or service purchases into the video format in a seamless manner.

AI PROMPT. "Hey, please identify five companies in our industry (or a similar one) that are using TikTok Shop effectively. Along the way, brainstorm some strategies for us to promote our own TikTok shop with TikTok videos."

I think the best way to think about "TikTok Shop" is to understand old-school "product placement." Back in the old days of TV, they would "place" a product inside a TV show, hoping that the consumer would get excited and remember to purchase it the next day at the supermarket or hardware store. It was not clearly marked as an ad, nor was the consumer warned that this was a "paid" placement in the TV show.

The path was thus:

1. Exciting content = TV show = TikTok video.
2. Product placement = a product or service "mentioned" or "endorsed" in the TV show = mentioned in the TikTok video, not as an "advertisement" but "seamlessly" as if it was truly honest.
3. Product purchase. Consumer purchases the "mentioned" product/service either in a real store, via a telephone number, or now via a TikTok shop.

Watch a funny mashup on "product placements" from the movie, "The Truman Show" on YouTube at **https://jmlinks.com/76g**. It's a campy way to see what's going on in

a funny way. TikTok is essentially structuring this "Truman Show" reality via the TikTok shop feature (as are Facebook, Instagram, YouTube, etc.).

Thus, on the content marketing side, the trick is to create "relevant" video content that gets your fans excited. You then promote a product or service without coming across as too cheesy, and fans purchase whatever you recommend through TikTok Shop. As an "influencer," you can do this for the products or services of other brands. Or as a "brand" or "content creator," you do this for your own stuff.

» MEASURE YOUR RESULTS

Professional or business accounts on TikTok offer more features and capabilities beyond those of simple user accounts. As you might expect, you can track video views, followers, and profile views. You can see views by geography, etc. Most importantly, you can see which videos are trending. Of course, when you start out, you are not going to see a lot of trending activity. You can also drill down into an individual video and view its engagement aspects. In sum, TikTok Analytics is very similar to YouTube Analytics.

Since TikTok also allows URL sharing and shares, you can track clicks from TikTok to your website or eCommerce store. However, 99% of TikTok is about engagement and branding, so don't expect it to be easy to monetize. It's more about the feel than it is about the spending, so to speak. More about making your brand cool and talked about than directly generating sales. But if you are a consumer-facing brand, you gotta consider TikTok!

»» CHECKLIST: TIKTOK ACTION ITEMS

Test your knowledge of TikTok. Take the TikTok quiz at **https://jmlinks.com/qztt**. Here are your TikTok **Action Items**:

- ❑ **Research** whether your customers (and competitors) are on TikTok. What are they doing? Why? Be sure to distinguish among individual accounts, creators, competitors, and companies-to-emulate. Be sure to understand how to follow accounts, find them (and their content), plus "train" the algorithm to give you what you like.
- ❑ **Set up** a **business account** on TikTok as well as a **personal account**. Conduct your market research in your personal account, as you can follow competitors without being obvious. Remember that everything is public, so ensure your brand account accurately represents your brand identity.

❑ **Brainstorm** a **content strategy** for TikTok. As on YouTube, you have primarily:

❑ **Your Own Content**. This is quirky, funny, brand-centric content that you create and post to your account.

❑ **Trending Content**. This is content that you create, but that piggybacks on trending *hashtags* or *sounds* on TikTok.

❑ **Rapid Fire.** Go through my list of "rapid-fire" ideas, and identify easy-to-produce content for your own videos, such as #*hacks*, behind-the-scenes, or duets on trending topics.

❑ **User Generated Content**. Here, you nurture UGC through contests, challenges, branded hashtags, and even clever sounds or songs that you create and promote as a brand for users. Chipotle and Wendy's are masters at this strategy.

❑ **Interactive Content**. Create "Duets" as well as use user comments (and/or comment on other videos). TikTok is conversational – so join the video conversation.

❑ **Repurpose Content**. TikTok's short, vertical format makes it excellent for cross-posting to Instagram, including Instagram stories. Take your content further by repurposing it for Instagram Reels, TikTok, and YouTube Shorts.

❑ **Promote Your Content**. Encourage content that will be "shareable" or even "go viral," plus use your other platforms to alert your fans about your TikTok account. Use strategies like #*hashtags* and trending sounds. Consider **advertising** if TikTok is a strong "yes" for you and you have the budget.

❑ **Create a TikTok Shop**. If you sell online, create a TikTok Shop and start promoting your products or services directly on TikTok Shop. If not, brainstorm ways to get customers excited about your company and then click over (via the one clickable link) to your website or store.

❑ **Measure** your results on TikTok by likes, comments, and shares. Measure whether your account is growing. The platform is still new, so be patient and realize that it takes only one "hit" to really get visibility.

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

»» DELIVERABLE: A TIKTOK MARKETING PLAN

Now that we've come to the end of our Chapter on TikTok, your **DELIVERABLE** has arrived. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), and click on the link to the "TikTok Marketing Plan." By completing this plan, you and your team will establish a clear vision of what you want to achieve through TikTok.

11
PINTEREST

Is Pinterest a social media platform? Not exactly. Like YouTube, Pinterest is a *hybrid* of three things. It is 1) a *repository for conte*nt ("pins" and "boards" uploaded by users and brands), 2) a *visual search engine* for users trying to build out ideas for do-it-yourself, dream dorm rooms, products to buy, listsicles, or other projects, and 3) a *social media service* that allows users to follow others, plus like, comment, or share pins (posts). Very much as on YouTube, users (and vendors) upload content, and users view content that matches their interests, either proactively driven by search or passively driven by the recommendation engine.

The primary marketing scenario is users searching for "things to buy" or "ideas" via the "idea board concept." Pinterest is powerful in **online shopping**, **do-it-yourself** (DIY) projects, and the **female** demographic, and is largely absent from everything else. Shoppers use Pinterest to browse the Internet and "pin" items they might want to buy onto "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, who are often a heavy shopping and crafty demographic, use Pinterest as a "buying/idea platform" and as a great platform for DIY crafting and recipe sharing. Yes, men use it too, but the reality is that it skews female.

If TikTok is "entertain me," and Instagram is "look at me," then Pinterest is "Help me brainstorm cool stuff to buy, build, or admire." It is *the* network for consumer retail, *the* network for craftsy do-it-yourself, including recipes and hobbies, and *the* network for anyone who loves to browse, dream, and shop.

Let's get started!

TO-DO LIST:

- » Explore How Pinterest Works
- » Search Pinterest and Identify Stuff to Follow
- » 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, check out the official guide at **https://jmlinks.com/36z**. Next, in terms of marketing opportunities, let's look at some use cases.

Let's use the example of someone planning out her *dream dorm room* for freshman year at college. First, she signed up for Pinterest and created a profile. Next, she would download and install the Pinterest save extension (see **https://jmlinks.com/54a**) as well as the Pinterest app (available for both Android and iOS). 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 Dorm Room" or even more specific boards, like "My Dream Bathroom" 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*!) 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 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, she can invite her friends, mom, dad, or sorority sisters to collaborate by commenting and pinning to the boards as well.

Beyond that, she could search Pinterest for more ideas, and her friends and family could also find pins themselves and pin them to her board. Pinterest is thus a *repository* for her ideas, a *search engine* to find new things that match her interests, and a *social media platform* to allow mom, dad, sister, and maybe even boyfriend to participate

Another use case is more in the "hobby" genre. It would be a person like me who is really into dogs. I love dog photos, tips on how to train your dog, dog toys that you can buy on Amazon or elsewhere, advice on dog snacks, DIY dog toys, and more. I love dogs! I especially love Labradors! I love half-lab, half-white German Shepherd mixes, and rescue dogs that are a little crazy! So I can create boards to help myself follow what's out there in the "dog world" and then follow people who have more time than I do and who share their own passion for dogs, dog toys, dog tips, Labs, black Labs,

Lab puppies, and other related topics. And if a person likes dogs but also, for example, likes football (which doesn't interest me), I can follow only his "dog toy" board and not his "I love Raider football" board. Pinterest makes it easy for me to share, learn about, follow, comment, love, like, and engage with other dog lovers wherever they may be in a visual way, and interact with folks who share my passion for dogs but not other passions that I have, or that they have. This ability to follow not just the whole person or account but a specific board is unique to Pinterest.

A third use case is in the "How to" category. A person who likes to quilt would create her own pins and boards, and also like, comment, and share the pins and boards of others. The "quilting" community can thus use Pinterest as a way to socially share and interact with others who share a passion for hacks, tips, and tricks about quilting. And, like all other social platforms, a significant amount of content on Pinterest is now video. In each case, imagine your target customer using Pinterest to find and pin interesting products to her "idea board," utilizing Pinterest as a visual search engine, and using Pinterest to follow and collaborate with others. It's a three-for-one platform that, while relatively small, is incredibly important for B2C product retailers.

THE ESSENCE OF PINTEREST IS THE IDEA BOARD

The structure of Pinterest, in a nutshell, is:

Individual profile: me, Jason, as a person, or Wells Fargo as a brand.

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." New for 2026, Pinterest is using AI to "recommend" content to users for their boards based on perceived interests; this is all the more reason to build out robust content in your Pinterest posts, so that the AI understands the relevance of your pins.

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 and things to buy. I can also upload items directly.

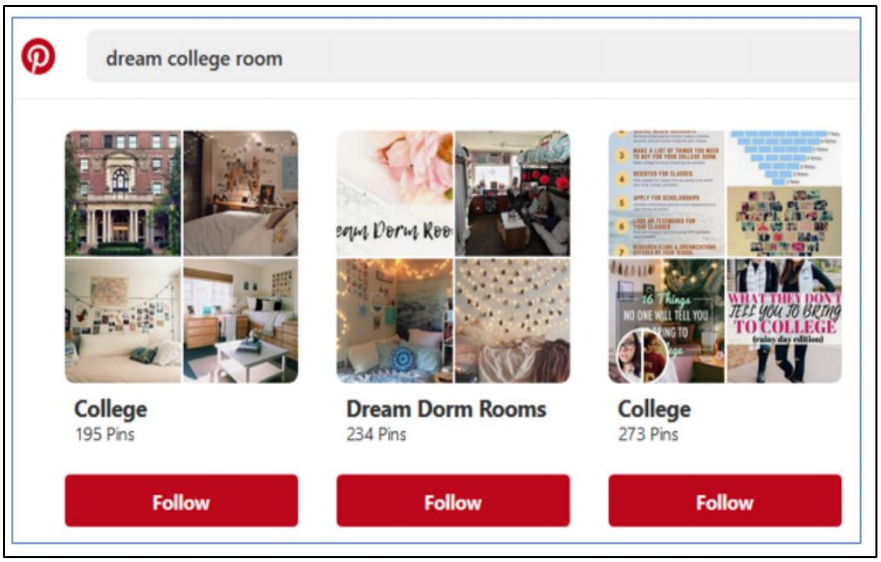
Collages. New for 2025-26, "Collages" are a synergy between idea boards and cutouts. Rather than a single image, collages group multiple items or ideas into one visual. Users can "cut" other pins and recombine them. The focus here is strongly on the "idea generation" aspect of Pinterest. Learn more about collages at **https://jmlinks.com/77k**.

Search. Browse Pinterest, search Pinterest, or search the Web for interesting things to "pin" to boards. Indeed, Pinterest describes itself as "Pinterest is a visual discovery engine for finding ideas like recipes, home and style inspiration, and more."

Collaboration: Users can invite others to comment on their boards or pins, and pin items directly to boards. This mutual pinning and commentary is the "social" aspect of Pinterest.

Social: Users have a news feed through which Pinterest shows pins of people, brands, and boards they follow, as well as suggestions based on (revealed) interests (i.e., "recommendation engine"). People can also follow boards created by others, and like, comment on, and reshare items that are pinned. This includes brands.

To get the hang of Pinterest, create your personal and/or business profile, set up some boards, download the "Pin it" button, and start exploring the Pinterest app or using it on your desktop. Using Pinterest is the best way to begin understanding how to market on the platform. For example, to view a Pinterest search for "dream college dorm rooms," visit **https://jmlinks.com/2o**. To see some sample idea boards, visit **https://jmlinks.com/13f**. Here's a screenshot of a search for "dream college room":



Notice how people use Pinterest as a **visual bookmarking system** for ideas (largely, but not exclusively, of things to buy or make), and how others can comment on and even collaboratively contribute to these boards.

Let's look at how brands structure their Pinterest accounts. For example, consider the Target strategy on Pinterest. The massive retailer has "drill down" elements, such as:

Account. This is the entire Target account (**https://www.pinterest.com/target**). Users who love everything about Target can follow the *entire* account and receive notifications in their newsfeed whenever Target posts some*thing*.

Boards. These are listed under "saved" (**https://www.pinterest.com/target/_saved/**). These are "collections" that are category-specific boards of pins created by Target. Users who do not want to follow all of Target can choose instead to follow specific boards such as Kids Toys (**https://www.pinterest.com/target/kids-toys/**) or Gifts for her (**https://www.pinterest.com/target/gifts-for-her/**). Boards enable a more exact relationship between users and the themes they want to follow.

Shop. New for 2026, Pinterest has eliminated a dedicated shop tab. Instead, the app is now cluttered with ads (especially for Amazon, which may be planning an acquisition of Pinterest), and vendors who tie their e-commerce sites to Pinterest can enable shopping throughout their boards and pins. Users can always pin items that live on other sites (such as Amazon or Etsy). Shopping on Pinterest is thus fully integrated with the experience. To learn more about shops on Pinterest, visit **https://jmlinks.com/77p**.

Pins. These are individual items, similar to posts on Twitter or Instagram. For example, the "All Things Avocado Gift Kit" (**https://jmlinks.com/57q**) lives under the board "Gifts for Her" under the master Target Account.

Idea Pins. This is Pinterest-speak for video content, similar to "stories" on Instagram or Facebook. Upload a short video, and it will be shared with your followers (account or boards).

Brands like Target thus want not only to get their pins out into users' newsfeeds but also to motivate users to follow the brand as a whole or specific boards.

Boards create a unique marketing opportunity. Expectant mothers might follow the "things for pregnancy" board, fishermen might follow the "outdoor products board," swimmers might follow the "things for your pool" board, and so forth. As a marketer, you must brainstorm not just an *account strategy* but also a *board strategy* on Pinterest. Which content themes will position your brand as a "helpful expert?" Fishermen want to follow a board on fishing tackle, rods, and tools; pregnant women want to follow a board on sleep aids, skin creams, and preparing for baby. Your marketing strategy thus

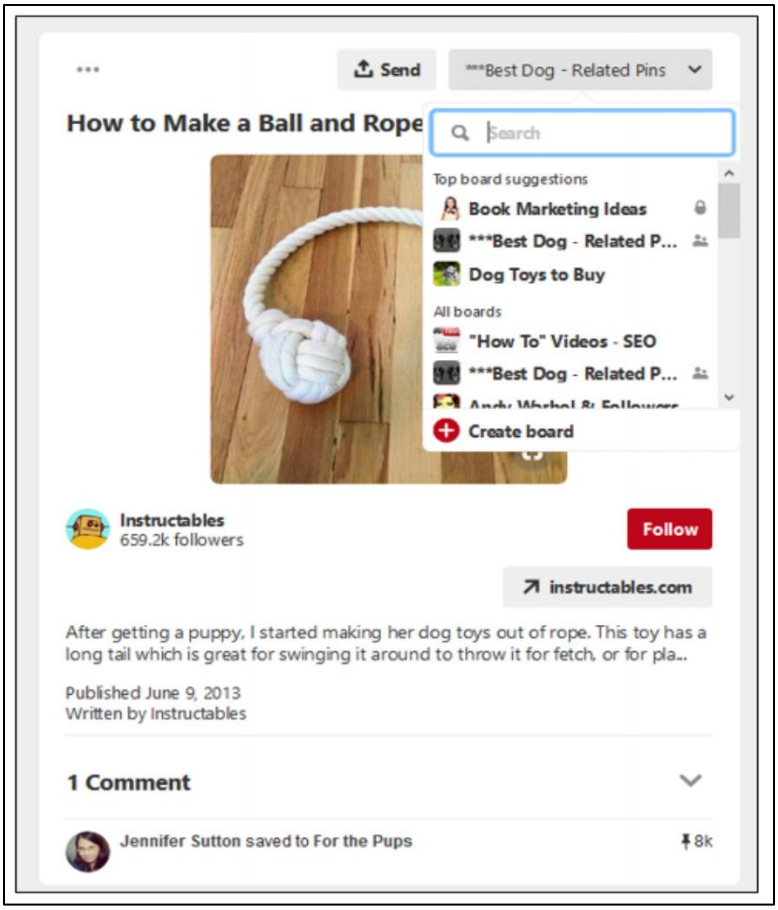
becomes a) identify your own products that match a user need vs. a theme, b) create boards around those themes, and c) remember that you can "pin" not only your own products or services to your board but those of others as well, and you can also pin blog posts, videos, images, etc. A "board" is a collage of items, some of which are "buy my stuff" and some of which are "this is interesting and useful."

Turning to pins specifically, 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 the product or service referenced by them. (These can also be links to blog posts or videos).
>
> **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.

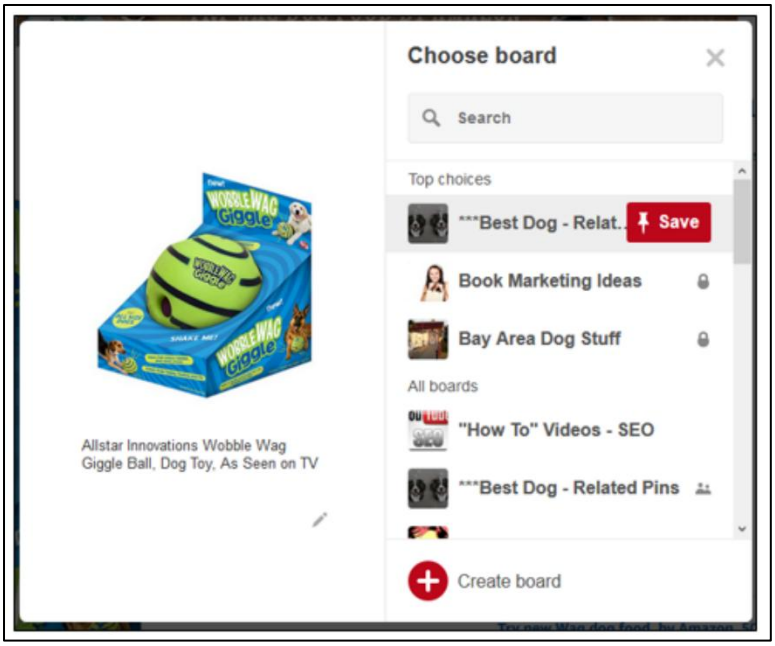
Once you understand the idea of visual bookmarking or "idea boards," then you've grasped the essence of Pinterest. Once you grasp the concept of being a "helpful vendor" with "helpful boards" that identify fun, lively things to do, buy, or make, and you grasp the idea of encouraging your customers to "pin" your products to their boards, you're moving to best-in-class marketing via Pinterest.

For example, when I find a post on Pinterest about a DIY dog toy, I can then pin it to my "DIY Dog Toys" board. Here's an example:



At the top right, you can see Pinterest prompting me to save it to one of my boards, such as my "Best Dog-Related Stuff" board. Then, notice at the bottom left, how it indicates that Jennifer Sutton saved this Pin to her own board, titled "For the pups." I can then click over to her or her board and discover a fellow dog lover to follow on Pinterest. In this interactive way, people browse stuff on Pinterest, save it to their own boards, and find folks with similar interests.

Using the Pinterest button, you can also surf the Web and pin items you find to your boards. For example, I can go to Amazon, find a dog toy that interests me, and pin it to my board. Here's an example of this:



In this way, Pinterest is very "outward-looking." As a brand, you should do everything possible to encourage people to pin from your website or e-commerce store to their Pinterest boards. Pinterest offers a free "save add-on" button that enables this feature on your website or e-commerce store easily; learn more at **https://jmlinks.com/77n**. Obviously, you need a visually appealing, highly shoppable website (preferably an e-commerce site) for this to work well. Another feature is the so-called "rich pins," which transmit data in real-time from your e-commerce store to your pins on Pinterest (such as price, colors, and other options). Learn more at **https://jmlinks.com/77p**.

Pinterest Allows Outbound Links!

Unlike Instagram or TikTok, Pinterest (like X, Facebook, or LinkedIn) allows outbound links. Any pin can be clickable to a website or an e-commerce store. Thus, in our example of a "dream dorm room," the shareable board and its pins could be outbound links to Amazon, Target, REI, and so on. For this reason, retailers love Pinterest as it is sort of like X (X) for buying stuff.

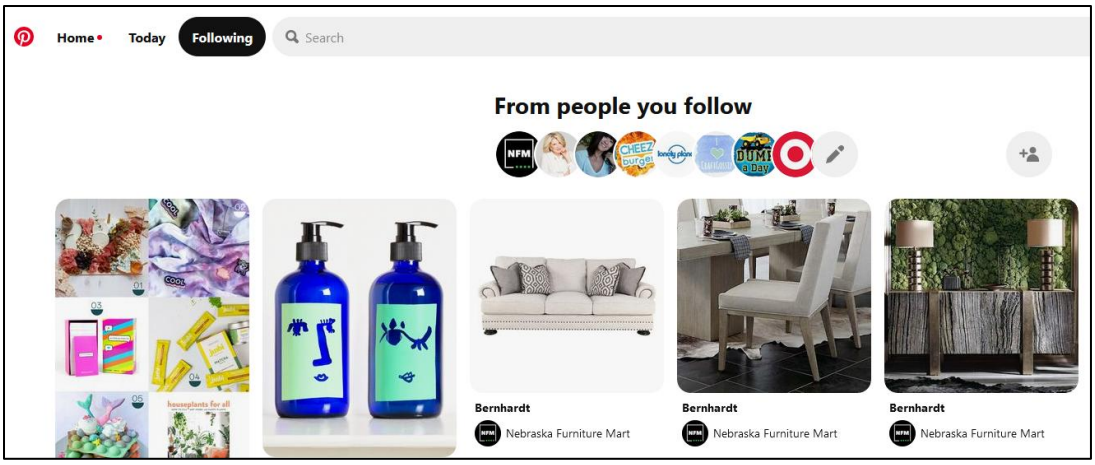
That's the *good news*.

The *bad news* is that Instagram and especially TikTok are orders of magnitude more popular than Pinterest. Ask someone under the age of 20 about Pinterest, and they may not even be familiar with it. Pinterest appears to be slowly dying a death of neglect. It's falling off the radar, and only God knows what is wrong with its complacent management team. It remains strong in its core demographics, but seems to lack a future-proof plan.

Your Pinterest News Feed

As on other social media platforms, people can "follow" other individuals or brands (or just their boards), and when that person, brand, or board has a new pin, it appears in their news feed. In addition, notifications are generated when someone likes, comments, or repins one of your pins (or boards or account).

Once you've done some basic research and identified persons/companies, boards, and hashtags to follow, when you log in to Pinterest, you'll see their new pins in your news feed. This is the same structure as on Facebook. If I follow you, and you post a pin, it will appear in my news feed (and vice versa if you follow me back). You can also click on "Following" on the top left when you log in to see the newest pins from folks you follow. Here's a screenshot:



You can then click on the "+Person" icon at the top right to access yet another way to find new folks or boards to follow on Pinterest.

Be The "Helpful Expert" in Your Categories

Now, flip this around. As a brand, you want to create pins and boards that people **want to follow**. Why? Because you, as the "helpful expert," are identifying and posting intriguing content – content that interests and excites potential customers. That content could be your own content (pins of products, services, videos, blog posts, top ten lists, how-tos, DIYs, etc.), or curated content (content by others on these topics). Yes, you can also encourage UGC and interactive content, but for now, start with those two types – your own content and curated content. Take a look at the "boards" of your favorite brands and how they position themselves as a "helpful expert." The Bass Pro

Shops brand (**https://www.pinterest.com/bassproshops/**), for example, has boards on "hunting gear," "fishing gear," "home décor," and even "all things food" – boards that help outdoor lovers find cool gear (and buy it from Bass Pro Shops) to assist on their next hunting or fishing expedition. Target does the same thing. Martha Stewart does the same thing. You, too, can and should do the same thing: be the "helpful expert" in the categories that matter to your customers (and nudge them to buy your stuff). Here's the path:

> *Category > Board Idea > Pins of Your Products and of others > discovery via Pinterest by customers > clicks on Pins > ecommerce transactions.*

» SEARCH PINTEREST AND IDENTIFY STUFF TO FOLLOW

You can search Pinterest directly by keyword or by clicking on the categories button, and you can browse Pinterest by categories. Let's review how to do each. As you search Pinterest, you're looking for:

- **Individuals**. These can be power Pinterest folks who are really active on the platform. These are superfans, influencers, and other "brand advocates."
- **Companies or brands to follow**. These might be direct competitors, companies in your industry, or simply big brands that seem to be excelling at Pinterest, such as Target (**https://www.pinterest.com/target/**) or Martha Stewart Living (**https://www.pinterest.com/marthastewart/**).
- **Boards**. This is unique to Pinterest. You can either follow all of Target's content or drill into a specific board, such as Kids Toys (**https://www.pinterest.com/target/kids-toys/**).
- **Keywords**. Like X and Instagram, Pinterest is very keyword-friendly (formerly hashtags). Start typing keywords into Pinterest's search and look for relevant pins, boards, and brands.

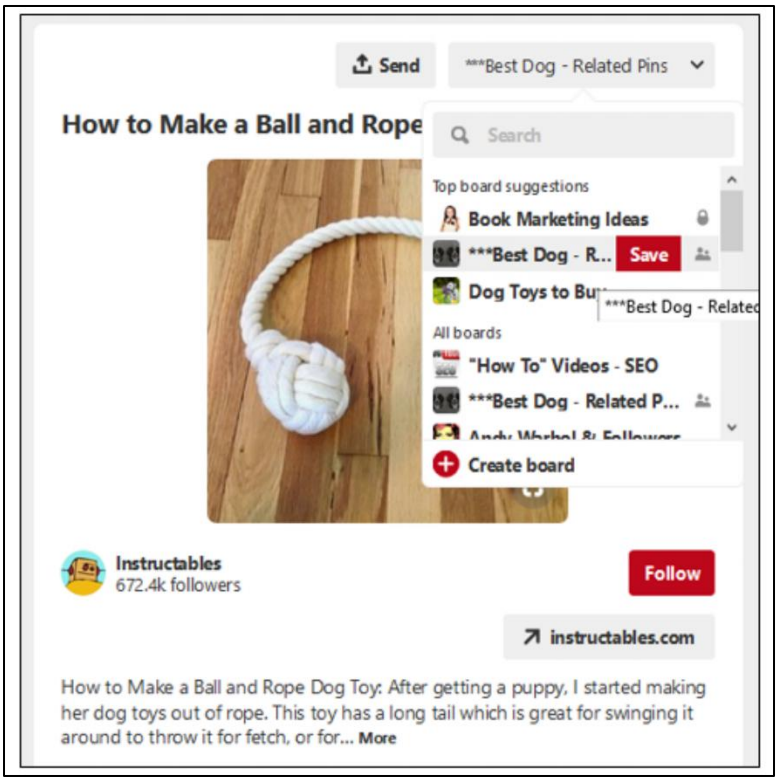
Once you find something interesting, click the red and white "follow" button to follow that company, person, or board. Like Instagram or X, there is no required acceptance at the other end. Pinterest is very open and public, making it primed for discovery.

If, for example, you were an organic baby food maker, you'd identify keyword themes like *organic, organic food, organic baby food*, etc., and then search Pinterest for companies, people, boards, and hashtags to follow. So, search by keyword and start finding pins,

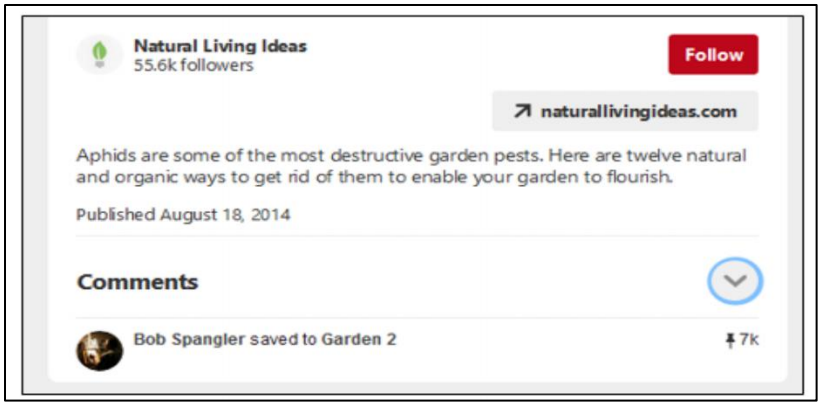
people, and boards that you like or that are relevant to your company. When you find an interesting pin, you can save it to a board you create on the fly or one you've already created.

> **AI PROMPT.** "Hey, please identify five companies to follow on Pinterest that are similar to our brand. Be sure to include the URLs of their accounts on Pinterest and explain why you think they are a good brand to emulate for us."

Within a keyword community, you can create boards that bring together pins and brands you want to follow. For example, I have a board called "Best Dog-Related Pins," where I can save interesting pins. Here's a screenshot:



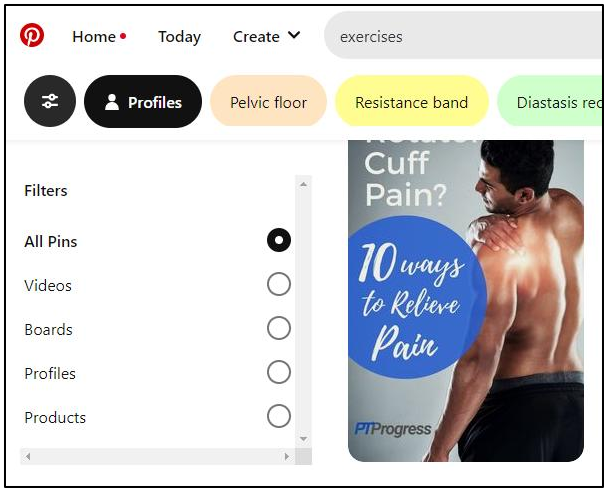
If a pin has a lot of engagement, you can also click down into the comments and find who pinned this pin to which board. For example, Bob Spangler saved this pin to his board "Garden 2":



You can also see that Natural Living Ideas has 55.6 thousand followers and that "Garden 2" has 7,000 followers.

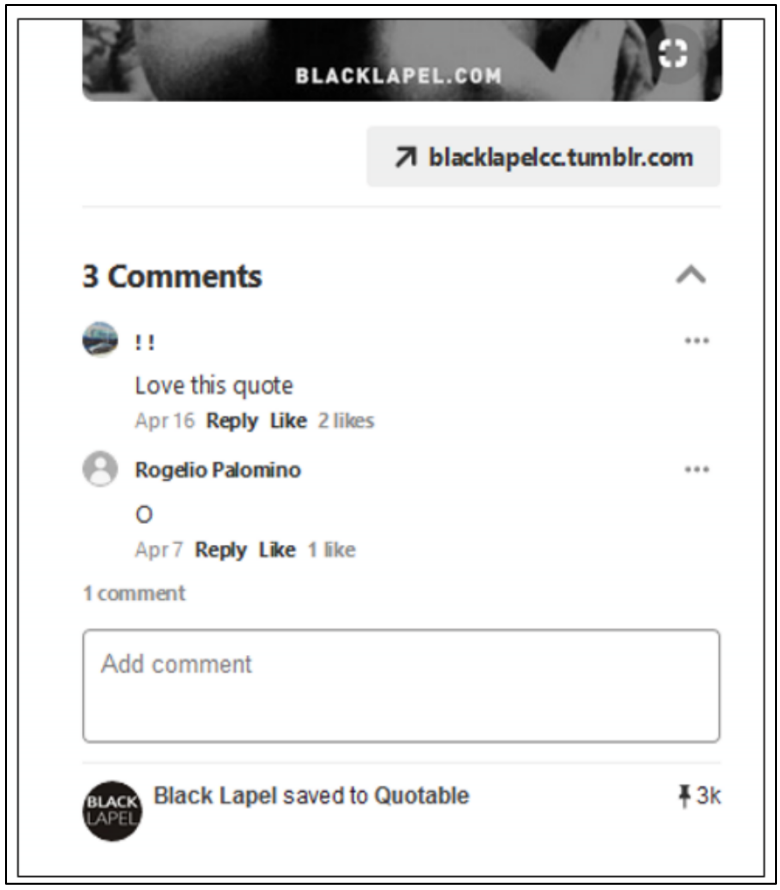
In this way, you can search by keyword and find the most popular pins, boards, and people to follow. Pinterest is both a search engine and a social media platform. With the basics in hand, let's review the available methods for discovering pins, people, brands, or boards to follow.

Method #1. Keyword Search. Type one of your keyword themes into Pinterest, such as "organic gardening," and then, on the right menu, search for **all pins** (the universe of all pins on the topic), videos, boards, profiles, and products. Here's a screenshot showing the pull-down menu on the left:

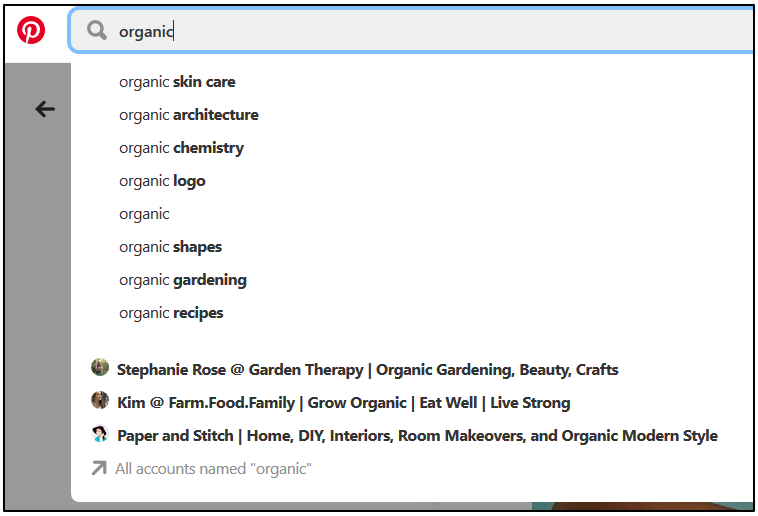


Search each category and begin to follow people/brands and/or boards that are relevant to your company. Look for engagement as measured by repins and comments.

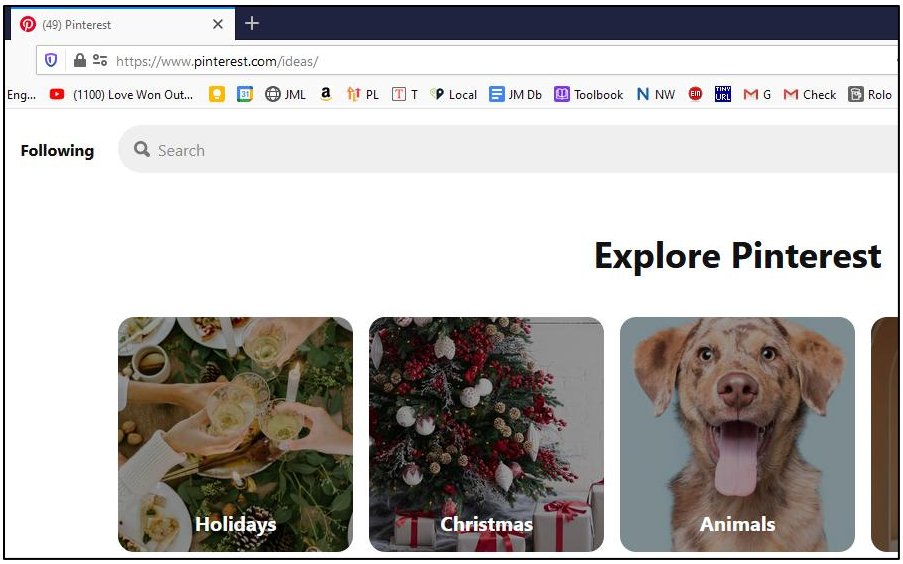
For example, here's a "quote" pin by Muhammed Ali, "If your dreams don't scare you, they aren't big enough," and here's a screenshot showing the comments and repins:



When you type a keyword into a Pinterest search, you can also pay attention to the suggestions that occur just beneath it. Here's a screenshot for "organic:"

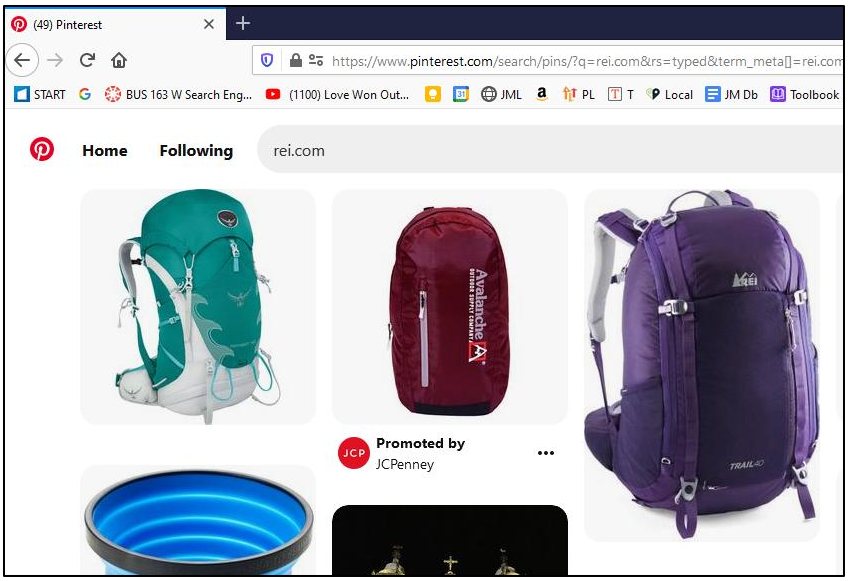


Method #2. Browse Pinterest by Category. Pinterest has somewhat hidden this feature, so type the following URL into your browser to access it: **https://www.pinterest.com/ideas**. This will then bring up a category index of Pins. Here's a screenshot:



You can then click into a category and view pins, as well as their subcategories. For "Animals," for example, you get suggestions like "Dogs and puppies" or "Cats and kittens." Click on these, and you will get more suggestions and subcategories. You can also browse the big trends at **https://trends.pinterest.com/**.

Method #3. Browse by URL. This is a bit geeky, but it's a great way to see which URLs have the most traction on Pinterest, whether you're a competitor or a big brand. To do this, you create a very special type of URL and type the URL of a domain into the search bar. It's not perfect, but it tends to pick up those pins that contain that domain. For example, here's **rei.com** via Pinterest search:



Replace *rei.com* in the string above with your own domain (or that of a competitor), and then copy/paste the complete URL into the address bar of your browser. Do this for your company regularly (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.

Method #4. Use Google. Finally, you can go to Google and enter *site:pinterest.com {keyword}* as in *site:pinterest.com "organic food"* or **https://jmlinks.com/46n**. You can use the Tools menu at the top right to select past year, past month, or even past 24 hours to see trending and new topics on Pinterest. You can also do this for a competitor, such as on *site:pinterest.com rei.com* via Google.

At the end of this process, you should have compiled a list of individuals or companies, boards, and keywords (formerly *hashtags*) to follow on Pinterest. Note that AI has replaced *hashtags* in the sense that the *keywords* and *context* are more important than hashtags.

» INVENTORY COMPANIES ON PINTEREST

The best way to determine whether Pinterest has value for 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 essential to realize that you can and should follow both companies and boards, as one company (e.g., Whole Foods) can have multiple boards (e.g., 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 your company's marketing strategy.

> **VIDEO.** Watch a video tutorial on Pinterest marketing basics at **https://jmlinks.com/77q**.

Remember that you're not really or necessarily a typical Pinterest user. You're a brand researching what's going on and figuring out if Pinterest is for you and, if so, what content strategy will work the best. 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 searches as listed above, and at the bottom, look for URLs 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 pets. You'll see that they have a board called "ETC" focused on dogs at **https://www.pinterest.com/WaggoPet/etc/**.
>
> **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 us know what you'd like to have made for you!

A quick way to find companies after a search is to look for "sponsored." When you click on these pins, you'll go to their websites. However, you can then put their name

back on Pinterest to find their brand pages. The reality is that advertising brands are also investing a significant amount of effort into creating organic content on Pinterest.

IDENTIFY COMPANIES THAT DO PINTEREST MARKETING WELL. REVERSE ENGINEER THEM.

As you research companies via your keywords, look for companies with a large number of followers and whose boards/pins display a high level of interaction, including numerous 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.

Not surprisingly, since Pinterest is so successful in the consumer retail sector, many of the largest 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/**.

Amazon at **https://www.pinterest.com/amazon/**

Amazon, in particular and for obvious reasons, is heavily integrated into Pinterest. In fact, the app will ask you to link your Pinterest to your Amazon account. *#Shopping!* While we're looking at retailers, let's look at some nifty tricks on Pinterest at the pin level. (Note: This works only on the mobile app version, not the desktop version.)

First, search for your keyword (e.g., "elves"). Next, find a pin that sparks your interest – especially one that is a product photo. Click on the pin. Tap on the pin to reveal a small magnifying glass in the bottom right corner of the image. Drag the corners of the selected area until you have highlighted the entire image or one aspect of it. Pinterest will then search for this image across its database.

Here's a screenshot:

Second, in some cases, the Pinterest algorithm will "tag similar products" in a pin. You'll see a shopping icon in the far right bottom of these posts. Tap on that, and you'll see a listing of the products with clickable links to pins where you can make a purchase. Here's a screenshot of this:

As a brand, you can also tag products in your own Pin. Learn more about tagging products in pins at **https://jmlinks.com/57r**. Since Pinterest will make "similar products" recommendations in many categories, I recommend that you tag all your pins with product links.

Don't be afraid to "follow" companies (even your competitors) via Pinterest. 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. As on other platforms, Pinterest has "stories" (called "idea pins") and shops as well.

For your first **TO-DO**, download the **Pinterest Research Worksheet**. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), 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 setup and marketing strategy.

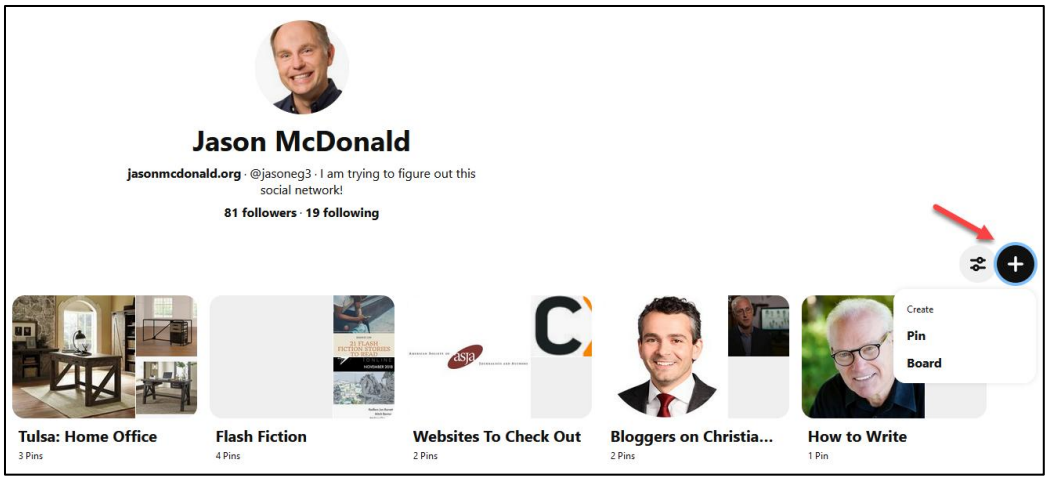
» Set up and Optimize Your Pinterest Account

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 **https://jmlinks.com/32h**.

Since you are joining as a business, be sure to claim or verify your website. Follow the instructions at **https://jmlinks.com/46r**. This will give you better analytics and the ability to tag products and mark pins that link to your domain with your profile picture.

Once you've joined, you only have a fundamental setup – 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 creating a board, provide it with a name, description, category, and a map or location (this is particularly useful for local businesses). Be sure to include keywords, as this is crucial for discovery in Pinterest search, but avoid being overly promotional. Write in natural English, yet include your keywords. If you're building out the board, you can also temporarily make it *secret* and then change it to *public* at a later date.

Ask for Collaborators

Pinterest boards can be collaborative, meaning you can have more than one "manager," and you can even invite customers or others to help pin stuff to your boards. If your company has superfans, this is a great way to engage with them. 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. You can also manually copy URLs 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 the same goes for your Pinterest boards. Your boards should attract people to follow them by providing something useful, visually appealing, and enjoyable. 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 **https://jmlinks.com/3a** vs. the board "Dog Gifs" at **https://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* (**https://post.bark.co/**), 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 summary, it is crucial to brainstorm your boards. The questions are:

- **What is this board about?** What ideas does it collect, and 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 designed to provide viewers with a quick and easy way to get a few laughs during their busy day. A board that collects do-it-yourself ideas for inexpensive 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, just as it is on all social media platforms.

Use ChatGPT to analyze your brand and target audience, and then ask it to identify five or ten "board ideas" that you can deploy on Pinterest. Similarly, when creating a pin, use ChatGPT to help optimize your pin summary, including relevant keywords.

For your second **TO-DO**, download the **Pinterest Setup Worksheet**. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), 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, 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).
- **Videos**. With the advent of "idea pins," Pinterest is aggressively promoting video. As on other platforms, you can upload a video to Pinterest, and the algorithm will favor its distribution to your followers.
- **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 very popular type of content.
- **How-tos and DIY**. Pinterest isn't only about shopping. The "how to" and "DIY" themes are very big on the platform. If you are in an industry such as quilting, for example, posting DIY content that helps your followers can be a big 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 "Shopping on Pinterest" at **https://jmlinks.com/55h**. Another option here is so-called *rich pins*, which are dynamically updated pins from your eCommerce store. Learn about them at **https://jmlinks.com/55m**.

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 regularly, 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 offer yummy food and entertainment for people to show up and stay. 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 receive insider tips, fun DIY posts, announcements about upcoming museum and museum store events, and select items from your online museum store, among other benefits. 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 X 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 by repinning their content, commenting on timely topics using hashtags, and reaching out to complementary Pages to collaborate on co-promotion. Experiment with the Pinterest "ideas" feature, which pushes out short video "stories" to your followers.
- **Pinterest SEO / Search**. People use Pinterest to generate ideas, especially before shopping for something significant, such as a wedding or a dorm room, and therefore, search is very prominent on Pinterest. Research your keywords, 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.

- **Be Interactive.** Pinterest is a social media platform, so be social. Like, comment, and follow the boards and pins of others. Comment on the fans of competitors. Interactive content is probably the most undervalued strategy for content and outreach.
- **Leverage your Fans**. People who like your Page are your best promoters. Remember, encouraging your customers to share your content is key to success. You want to leverage your fans as much as possible to share your content. Asking key influencers to participate in a board is an excellent 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 **https://jmlinks.com/54b**. Brainstorm a collaborative project with your customers, and utilize Pinterest as a means to facilitate online cooperation.

Rich Pins and "Product" 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 **https://jmlinks.com/55n** (rich pins) to learn more about these cross-linking strategies.

Keywords. Pinterest has all but abandoned *hashtags* in favor of *keywords*. Therefore, when creating posts, be sure to research and embed relevant keywords into the post description. For example, a post on "dog toys" might also include keywords such as "puppies" or "gadgets" to capture searches such as "puppy toys" or "gadgets for dogs."

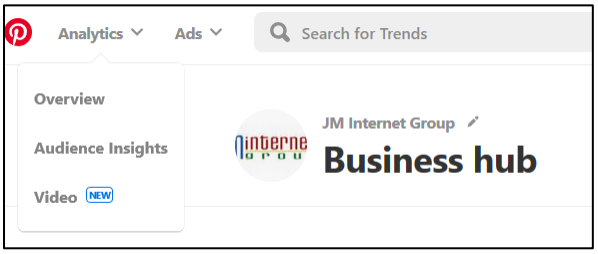
Pinterest SEO (Search Engine Optimization). Throughout, remember that search is very important on Pinterest. Ensure that you are familiar with your keywords and incorporate them effectively into the titles and descriptions of your pins and boards. People use Pinterest as a "search engine" to find interesting 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).

»» CHECKLIST: PINTEREST ACTION ITEMS

Test your knowledge of Pinterest! Take the *Pinterest marketing quiz* at **https://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.

❑ Tag products or services in your posts.

❑ Experiment with Pinterest "ideas" as the "story" equivalent to Instagram or Facebook.

❑ **Promote your pins** both on Pinterest by strategies like keywords 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 **https://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 **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), and click on the link to the "Pinterest Marketing Plan." By completing this plan, you and your team will establish a clear vision of what you want to achieve through Pinterest.

12
EMAIL MARKETING

Email marketing is the "Rodney Dangerfield" of social media marketing. Dangerfield, of course, was an American stand-up comedian with a rather campy, self-deprecating style. He'd say, "Take my wife," and then pause and say, "No, take my wife – *really*, please take my wife." Another famous Dangerfield quip was that he "Don't get no respect." Of course, he was one of the most successful comedians of his day. Like Dangerfield, email marketing doesn't seem to get "any respect." Yet, like Dangerfield, email marketing is far more effective than its trashy brand image implies.

In this Chapter, we'll explore the basics of email marketing and connect it both forward and backward to other social media channels. You can drive email signups, for example, from Facebook, and you can use your email list to drive social media events such as video views on YouTube, Facebook, or LinkedIn. You can also use email marketing to drive e-commerce events. What's not to like?

Let's get started!

TO-DO LIST:

- » Respect the Intimacy of Email
- » Master the Steps to Success at Email Marketing
- » Use Your List Forward and Backward
- »» Checklist: Email Action Items
- »» Deliverable: an Email Marketing Plan

» RESPECT THE INTIMACY OF EMAIL

Customers may follow you on X, like your Page on Facebook, or subscribe to your YouTube channel. It's not a big deal to "follow" someone on social. It's like meeting up for coffee. But getting customers to give you their email address – well, that's another story. And getting them to provide their "real" email addresses, not the ones used for spam or junk, is yet another story. Getting customers to "opt-in" to subscribe to your email alerts is more than just a cheap date. It's intimate. An email sign-up is like a

wedding night – they really love you, and they trust you enough to give you access to their email inbox. Those who sign up for your email list are likely to be superfans and micro-influencers, folks who are really "into" you, your brand, or "into" the industry, sector, or topic that you represent.

Think about that for a moment.

The person who is most likely to be willing to give you intimate access to their email inbox is exactly the person who is most likely to be a superfan.

And superfans are key to influencer marketing, social shares, and promotion across the entire social media marketing universe. You'd be crazy not to use email marketing. Crazy.

Email marketing is one of the best ways to communicate with your superfans. Better than Facebook, better than X, better than LinkedIn. I'd even argue it's better than your own company trade show because email marketing is available 24/7, and you can communicate with superfans throughout the year. Email, when done well, combines "interrupt" marketing with "permission" marketing. When done well, email means that people want to get your communication and can't wait to be "interrupted" to hear your latest message.

Email is awesome!

But people hate email marketing. It's perceived as spammy and trashy.

Why? That's easy. Because it's so *valuable* and vulnerable, email is heavily abused by spammers. If you think about it, however, you'll realize that the *outrage* against spam and spammers is just the flip side of the *intimacy* of email. People are outraged about spam because, to be blunt, it is a form of digital assault. It's a forced interruption into an intimate space, which is why spam is so nasty and terrible, and spammers are just awful, horrible human beings. Spammers and robocallers should be confined to a special circle of Hell.

Flip this around, and you'll see that if you can honestly gain customer permission and earn customer trust, then having a consensual email relationship can be great for both you and your customers. You need their trust and permission. For a great read on this topic, check out Seth Godin's *Permission Marketing* (**https://jmlinks.com/43a**).

Email is Owned Media

Indeed, email can be considered "owned" media vs. "rented" media. While you build out your Facebook or Instagram following, grow your connections on LinkedIn, or encourage views of your YouTube channel, you are ultimately not in control. Each

platform creates its own rules and has its own algorithm. Indeed, years ago, brands built out their Facebook Pages and enjoyed tremendous organic reach for free. However, nowadays, Facebook has significantly reduced or eliminated organic reach on the platform. You don't own your Facebook follower list; you rent it. The same is true across all the other platforms: no matter how great they are today, there is no guarantee that they won't dramatically change organic reach and the terms of service tomorrow.

EMAIL IS OWNED (BY YOU)

Email, in contrast, is something you own. While you may use a provider like AWeber or Constant Contact, **you own your list**. You configure it, and you send out the email blasts. There is no algorithm to worry about, other than the spam-fighting algorithm used by all major email providers, such as Yahoo, Outlook, or Gmail. Because you own your list as opposed to renting it, your email list is arguably a much more valuable digital asset than the number of your Facebook Page followers or views of your YouTube Channel.

Email can even be used *in conjunction with your other social media marketing assets (as I will explain in a moment), making it a prime catalyst for* effective digital marketing. Email can be used to encourage reviews on Yelp, Google, or even Amazon.

» MASTER THE STEPS TO SUCCESS AT EMAIL MARKETING

How do you use email successfully? First, identify what's in it for your audience. Why would a customer sign up for your email list? What's in it for him? Is it a free eBook? A detailed tutorial? Perhaps insider information, special discounts, or free offers? The "reason for subscribing," the reason why they want to receive and read your email list, is the anchor to your email marketing strategy. Start with something free, something compelling, and something non-threatening.

For example, Jordie van Rijn (**https://www.emailmonday.com/**) is a top-notch email marketer. He offers an incredible free newsletter on email marketing. On the right of every page on his website, there's a big red "get our newsletter" box. Click this, and you see his offer:

Remember "carrot" and "outreach" marketing? Take note of the yummy carrot – new content, professional insights, practical email marketing tips, and more. Once you click and submit your email (thus providing him with your contact information and the privilege of emailing you), you receive a fantastic email newsletter.

Your to-dos here are a) identify competitors and companies-to-emulate that offer email newsletters and other types of email offerings, b) sign up for their lists, and c) "reverse engineer" their offers, their content, and the mechanics of their email marketing systems. Pay particular attention to personalization. Many lists ask for your first name, company, etc., and then regurgitate this information to you in the form of a "personalized" email message. Indeed, Mr. van Rijn has a saying for how email marketing should work: "right message, right person, right time."

As is true for all social media, your "posts" to email (that is, the e-blasts that you send out and the content within that email newsletter or other blast) should thus be 80% or more "fun, fun, fun," and 20% or less "buy my stuff." The reason for subscribing needs to be a "carrot" of some type, that is, some type of content or offer that's very enticing and ongoing. Then, each blast needs to be configured as a type of "sub carrot," as it were. Yes, you can send out an e-blast that is very much "buy my stuff," but the total email marketing package to subscribers needs to be 80% or more "fun, fun, fun," and only 20% or less "buy my stuff."

> **AI PROMPT.** Explain to ChatGPT the basics of your email list strategy, including your target customers and the reasons why they would want to read your list. Next, feed it some content in your industry, and have it compose a blog post or two. Then, with those blog posts in hand, ask it to write the basics of your monthly e-letter. Don't just use it mindlessly, however. Check its work and use ChatGPT as your "first draft" in email newsletter content.

As for subscribers, always make it clear that you won't spam them. Don't frighten them away with "hard sells." Don't abuse the trust relationship.

Technical Issues with Email Marketing

Next, there are the technical issues of email – choosing an email provider like AWeber, MailChimp, or Constant Contact, for example. To be honest, there aren't huge differences between them. All provide very good technical support. They all provide a lot of technical help with building lists, creating sign-up forms, managing email blasts, and handling unsubscribes, among other tasks. I recommend using a formal email provider, as the technical mechanics of getting your email to recipients, even those who have proactively subscribed to your list, are not easy. Outgoing emails face aggressive "spam filters," so much so that even a subscriber who has proactively subscribed to your list may not see your email or may even mark it as spam.

> *Getting email reliably delivered is no easy feat, so use a paid service.*

There is the actual sending of the emails. Will it be done on a daily, weekly, or monthly basis? Will it be an email newsletter of one size fits all? Will it be more narrowly customized? Or will it be a **DRIP** campaign? (Drip marketing is the strategy of sending "drips," or pre-written emails automatically via a computer program. Amazon does this all the time – a few days after you make a purchase, you're sent a "please review us" email, for example, and a few days after you browse Amazon, you'll be sent a "you may also like" email. DRIP campaigns can also be set up with eBooks and other free tutorials as the first offer, and then plugs for paid services coming next.) The mechanics have to do with the sign-up, sending, and measurement of email messages and email marketing.

> **AI PROMPT.** Prompt ChatGPT to take your business value proposition and the logical steps in your sales process from discovery to sale. Prompt it, "Knowing what you know about the likely sales process for our customers, help me create a DRIP email campaign of five emails with subjects, short messages, and action-items, as well as the time period between messages."

You can also segment your list into sublists, so that people who like dogs receive specific messaging, those who like cats receive another set of messages, and individuals who like iguanas receive their own tailored content. The more personalized and the more customized you can make your emails, the better.

Promote Your List

Third, there's the issue of promotion. How will potential and existing customers discover your list? What will motivate them to sign up? What are the mechanics of signing up? What are the mechanics of unsubscribing, so that they feel "safe" subscribing to your list in the first place? To grow your list, ensure it's a prominent action on your website, easily accessible on your social profiles, and a desired action in many of your posts. If you launch a new, free eBook or webinar, for example, you can use these reasons to drive subscribers. For instance, after a webinar is successfully completed, you can require attendees to sign up for your email list to receive the recording, and so on.

» USE YOUR LIST FORWARD AND BACKWARD

Email, like all social media, is not an end in itself but rather a means to an end: a way to build your brand and ultimately sell more products. As you work on email marketing, a good way to think about your list is to consider both the past and the future. As for "forwards," I mean thinking of email as an intermediate step in the customer journey or sales funnel, between the initial awareness of your brand on Facebook and the actual purchase on your e-commerce store (or becoming an active sales lead via a feedback form).

For example:

1. A customer learns about your brand on Facebook through a post.
2. He signs up to "like" your Facebook Page.
3. Over time, through posts on Facebook, he learns that you have an email list with even more interesting content – perhaps content reserved for superfans, special deals or offers, or inside information on the brand, etc.
4. He signs up for your email list.
5. You then feed him information on your brand, consisting of 80% or more "fun, fun, fun" content and 20% or less "buy my stuff" information.
6. He then ultimately clicks from one of your "buy my stuff" posts to your e-commerce store and makes a purchase.

Facebook is less intimate than email, and email is less intimate than becoming a paid subscriber. You are using email in a "forwards" direction to move customers along the customer journey or sales funnel from Facebook to email to a sales lead to a sale.

Using Email in a Backward Direction

Email can also be used in a backward direction. How so? Having read this far in the Workbook, you should know that *reviews* matter a lot on Yelp, Google, and Facebook, and that *video views* matter a lot on YouTube, Facebook, X, and LinkedIn. Because email is more intimate than true social media, you can leverage the enthusiasm of your superfans on your email list to grow your social media following and reach. Let's say you've launched a new video on YouTube; you can then:

1. Announce via your email list that you have a new, fun, and informative video on YouTube on the topic of such-and-such.
2. You can ask your email list fans to watch the video, like it, comment on it, and even share it.

In this way, email can increase the view count and engagement of a video on YouTube. Because the YouTube algorithm pays attention to the velocity of engagement, using email at a strategic moment can help propel a video to the top of YouTube search and shares. The same goes for videos on Facebook, X, and LinkedIn. All platforms reward views, engagement, and velocity – again, meaning that you can use email to prime the pump.

As for reviews, you can offer bonus content for books (as I do) or merely use email to push out requests for reviews on Google, Yelp, Facebook, and other local platforms. Not surprisingly, paid services like GatherUp and Reviewbuzz rely heavily on email (and text messages) to juice reviews. Use the Campaign URL Builder (**https://jmlinks.com/57s**) to set up "utm" codes in your outbound links. These will allow you to track in Google Analytics visits from your email list to your website, thus giving you valuable insights into what happens "after the click."

In summary, email is not an end in itself, but rather a means to an end. It can fit into almost any phase of the customer journey, moving forward or backward.

Email is awesome!

»» CHECKLIST: EMAIL ACTION ITEMS

Here are your email **Action Items**:

- ❑ **Research** -
  - ❑ Whether **your customers** might be interested in signing up for an email newsletter or email notification. Why or why not?
  - ❑ Whether **competitors** and their email marketing efforts. Sign up for their email lists in "stealth mode" and monitor how they utilize email for marketing purposes.
  - ❑ Whether **there are similar companies to emulate**. Look beyond your own industry and sign up for the email lists of leading companies that use email well.
- ❑ **Set up** an email account on one of the big providers, such as AWeber, Constant Contact, or Mailchimp, and begin building your list.
  - ❑ **Identify a "carrot" for your list.** Brainstorm why people will want to sign up for your list and create a "carrot" (the big reason), and then, as you create a message, ensure that each message, or at least most messages, has "carrots."
- ❑ **Begin sending emails.** Start with content that people will want to get in their email inbox and then brainstorm a –
  - ❑ **Forward path** – that is, getting people to subscribe to your list in the first place, and then using email as an intermediate step between awareness and a desired action, such as an e-commerce purchase or a sales inquiry.
  - ❑ **Backward path** – that is, using email to support other social media efforts such as reviews on review sites or video views.
- ❑ **Measure** your email success via subscriber growth, click-throughs, and unsubscribes to your list.

Check out the **free tools**! Go to my *Social Media Marketing Dashboard* > *Email* for my favorite free tools on email marketing. Just visit **https://jmlinks.com/smmdash**.

»» DELIVERABLE: AN EMAIL MARKETING PLAN

Your **DELIVERABLE** has arrived. For the worksheet, go to **https://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), and click on the link to the "Email Marketing Plan." By filling out this plan, you and your team will establish a vision of what you want to achieve via email marketing, including your KPIs (Key Performance Indicators)

NEWS
STOCK MARKET

13
EPILOGUE

There's always something new! That's what makes social media fun. 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 that there will be a new "next big thing," and I guarantee that they will hype it in such a way that you just "gotta" be doing it.

As we conclude our journey through the world of social media marketing, I would like to highlight some of the newer opportunities (ones that have not yet gained substantial traction for small businesses) and provide you with a conceptual framework to consider and evaluate them.

Finally, I want to motivate you to "just do it" and "never stop learning."

Let's get started!

TO-DO 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 always seems to be a "new" new thing in Social Media. TikTok remains the "new kid" on the block among major social media platforms. It's the darling of teenagers and has revitalized short, quirky videos. TikTok shows, among other things, that there is room in social media for innovation. Big providers like YouTube, Facebook, and Instagram have failed to capitalize on the hunger for authentic, silly, and – let's admit it – *narcissistic* videos. Will it succeed? Who knows? However, I would argue that the same rules of video that apply to marketing on YouTube will ultimately apply to TikTok.

Create great, engaging content that "builds your brand" and ultimately "sells more stuff," but in a soft-sell kind of way.

Another trend is the politicization of social media. TikTok, for example, is banned in India due to concerns about its Chinese ownership, and it's not beyond thinking that it might become prohibited or restricted in the United States, as the deal deadline remains in effect at the time of this writing. Zillionaire Elon Musk now owns X, and amidst that controversy, who is to say what the "future" of X really is?

Snapchat (**https://www.snapchat.com/**) is another one that's hard to place. Snapchat isn't really a social media app; it's a *messaging* app with ads. So far, the main opportunities for brands are in the "stories" feature (organically) and via advertising. It's unclear whether Snapchat will survive the competitive onslaught from Instagram, which appears to steal its features constantly. It is clear that Snapchat's model of being more "private" messaging than "social media" is something that Mark Zuckerberg, in particular, is keen to imitate, hence Facebook Messenger (**https://www.messenger.com/**). Watch for both Facebook and Instagram to trend towards being closed vs. being open. X, in contrast, seems to be going in the opposite direction. Instagram Threads (**https://www.threads.net/**) and Bluesky (**https://bsky.app/**) are attempts to replace X.

A few that are really doing well include the following. First and foremost, pay attention to Substack (**https://substack.com**), which has become the place to follow (often pay to follow) thought leaders such as journalists and bloggers. It's where you dig in deep to "the rest of the story." Reddit (**https://www.reddit.com**) is a second platform that, in the age of AI, is increasing in popularity. Reddit often ranks well on Google (and AI-related) searches, and users love the informal back-and-forth of asking the "community" for help on issues. Reddit now offers a robust advertising platform at **https://ads.reddit.com/**. Lemon8 (**https://lemon8-app.com**) is a TikTok-based platform that aims to blend the features of Pinterest and Instagram, creating a "lifestyle" app for Gen Z.

Yet another one to watch is Medium (**https://medium.com/**), which is pretty moribund but was once a place for long-form content. Quora (**https://www.quora.com/**) is another platform that's not exactly new, but rather niche – it's a platform where you can ask and answer questions. As for niches, there are platforms like GoodReads (**https://www.goodreads.com/**), which is THE place for book lovers and authors to interact, and then there's Meetup (**https://www.meetup.com/**), which helps events "self-organize." There are even sites like "OnlyFans" (**https://onlyfans.com/**) that focus on adult hookups (if you're into that). And then there's Donald Trump's personal favorite, Truth Social (**https://truthsocial.com/**).

AI PROMPT. "Hey, please identify the top five social platforms that are up and coming. Ignore the major platforms like Facebook or TikTok. Give me a list of platforms to watch, especially those relevant to our industry."

"Riches are in the niches," someone once told me, so I advise you to keep an eye out for new social platforms and/or niche social platforms that might be THE place where YOUR customers hang out. Social media is ultimately all about YOU and YOUR CUSTOMERS, not about the latest cool thing for teens, be that Snapchat or TikTok.

The best advice I can offer is that for most small to medium-sized businesses, wherever you see opportunities, seize them! What is critical for one company may be irrelevant to another, and not just a network (e.g., Snapchat) but a feature (such as "Reels"). It's not one size fits all. And be aware of potential backlashes as well. I predict oversaturation soon for "influencer marketing" and a backlash against the somewhat shady trend of influencers being paid to promote products without being entirely transparent with their audiences about this fact. Privacy is yet another backlash in the works, both from governments (such as CCPA in California or COPPA at the federal level) and from users (who are sick and tired of their data being sold).

Here are my recommendations:

- **Keep an eye out for new social media platforms that may be relevant to your business, such as** TikTok, Substack, Instagram, or Reddit.
- **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 authentically while still achieving a marketing objective. Is it possible to use TikTok, Snapchat, or Instagram Stories 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 TikTok, Snapchat, or Instagram and the "old" social media like Facebook or X. But beyond TikTok, Snapchat, and Instagram, you may find social media platforms 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 members of the same genus, if not the same species.

Along the way, keep your eye on established social media platforms like Facebook, LinkedIn, X, and YouTube, as they are also innovating and adding new features. Facebook's move to native 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 as a platform for B2B blogging. Reels? Yes, please. As part of your information strategy, identify the official blogs of 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. Check out the dashboard (**https://jmlinks.com/smmdash**) *for my favorite resources on Social Media Conferences and Social Media Publication*s to stay informed.

» JUST DO IT

Voltaire said, "The perfect is the enemy of the good," and today's Nike corporation said, "Just do it!" before it, too, got embroiled in controversy. In both cases, the idea is to "learn by doing," not to be afraid to take bold action, and to simply "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," constantly researching and never taking action. 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 X.

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. (Good advice even for Nike).

Everyone – including myself- is just learning how to "do" social media marketing. Don't be intimidated. There are no real experts. Only 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 done so, download my Marketing Almanac 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/)**). If possible, try to attend the yearly trade show, *Social Media Marketing World*, which is really a fantastic learning opportunity for those who have already mastered "the basics."

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://jmlinks.com/smm2026ocsn/** (then enter the code '**smm2026ocsn**' to register your workbook), and click on the link to the "Social Media Marketing Plan Big Picture Worksheet." By completing this plan, you and your team will establish a clear vision for the top-level strategy. Then, by filling out the plans and worksheets for individual media platforms, such as X, Facebook, or Instagram, you'll have a detailed understanding of the approach for each medium. So get started, and in the immortal words of Garth Algar, in the movie Wayne's World, "Party On!"

» A FINAL FAVOR

If you've read this far, well, I'm impressed. I feel that, at this point, I should share with 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, the World would be a lot nicer. But I digress.

I hope you've enjoyed this journey with me. If the Spirit moves you, I would greatly appreciate a short, honest review of the *Social Media Marketing Workbook* on Amazon. Open your browser, navigate to Amazon.com, and search for the book. (You can also click on **https://jmlinks.com/smm**). Click on "customer reviews" and then on "Write a customer review."

Thanks in advance.

SURVEY OFFER

CLAIM YOUR $5 REBATE! HERE'S HOW -

Visit **https://jmlinks.com/survey**.

1. Take a short, simple survey about the book.
2. 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 ~

SUBJECT TO CHANGE WITHOUT NOTICE

GOT QUESTIONS? CALL 800-298-4065

NOTES

NOTES

NOTES