

Matthew: Hello and welcome to Marketing Smarts, a podcast brought to you by MarketingProfs. I'm your host Matthew Grant, Managing Editor here at MarketingProfs and I thank you for listening.

Last week we talked about measuring social media ROI and this week we're going to be talking about social media strategies. The word strategy kind of freaks people out, which is many social media strategies very quickly turn into social media plans with a special emphasis on tactics.

I understand you've got to get to the tactics eventually, but it really is better if you start with a more strategic perspective. That means thinking through and articulating how your social media efforts are going to support the overall goals of your business.

Today's guest Shannon Paul has not only thought and written a lot about social media strategy, you can read her thoughts at **VeryOfficialBlog.com**, but more importantly she's spent a lot of time developing and implementing social media strategies in the real world. Something she currently does for Blue Cross Blue Shield of Michigan.

We invited Shannon to Marketing Smarts to talk about the benefits and challenges of creating effective social media strategies, as well as other things she's learned from her years now in the social media trenches.

Before we get started I did want to remind you that we love feedback here on Marketing Smarts. If you like what you hear, or even if you don't, please go to iTunes and leave us a review. We do pay attention to that stuff.

Also, if you have a comment or a question you can always send me an email. My email address is mattg@marketingprofs.com. Finally, feel free to leave us a comment about this episode or any episode at the MarketingProfs Daily Fix Blog.

All right then. Without much further ado, Shannon, welcome to Marketing Smarts.

Shannon: Thank you.

Matthew: I was wondering before we get into things, since you have been a social media professional now for several years, if you could talk about how you got into social media work wise.

Shannon: Well, I was working in PR and I was reading a lot of things that social media is the future of PR and just kind of a lot of the industry publications. I was curious. When I finally started poking around a bit, I had always been interested in blogging and was never intimidated by the internet. I was one of the first people that I knew that had the internet when I was in

high school and I remember using Prodigy and talking to people on BBSs and getting kicked off, listening to those old modem kind of tones.

When I started to connect the dots in my experience I realized that a lot of what social media was talking to people online. I was like, "I know how to do that." As I took a deeper dive I started just becoming really curious. I was doing a lot more of just talking to people because I wanted to learn, not because I thought I knew more than anybody else.

I guess a lot of the sort of zeitgeist around social media a few years back was really about communicating to people like a human being. Not pitching them, not messaging them, but just talking to them and focusing on being human, focusing on showing up and listening to people and talking to them and really focusing on building relationships.

That's what really appealed to me. So I started doing a lot more social media planning or helping people where I was working develop plans that included more of an online component, some social media planning so to speak. I started blogging outside of my regular work day.

So I did a lot of sort of self studying outside of the workplace. I started initially really just being active on Twitter and commenting on a lot of other people's blogs, asking questions, probably being really annoying, and people were always really gracious with me. I think the social media community, so to speak, sort of helped elevate me and sort of paying attention to some of the things I was saying.

Then I started writing on my own. I created my own blog. When I started leaving comments that were three paragraphs long I thought, "Maybe I should write a blog post." So I did a lot of that outside of my regular work day.

In 2008 the Detroit Red Wings, the hockey team for people who live in non-hockey states, approached me about helping them launch their social strategy. That was really the first time I took on the social media title as an official role where I had "social media" in my job title.

After that I was later approached by a firm called Peak Six. They're in the financial services space, but the company invests in web startups. They had an online brokerage that I helped integrate social media communications into their strategy. And another site called We Seed, which is really a stock market game so people can learn with sort of fake money how to invest.

I was there for awhile, I worked with a lot of really smart people in the online space. I learned a lot and I also moved to Seattle during that time and I met a lot of great people. The Seattle community is fantastic for social media and search and people looking to do online marketing and online communications.

I was approached by **Andy Hetzel**, who is actually the VP of Corporate Communications for Blue Cross Blue Shield of Michigan. He asked me if I knew anybody to fulfill the social media manager position that they had. I immediately asked him if he was asking me if I was interested, because that's what recruiters always say is, "Do you know anyone?" and it was back in my home town.

I looked at the description and I said, "Wow, that seems really difficult. I want to know more." Being that I had a taste of sort of integrating social media into a very regulated industry, because we had a brokerage and that's regulated by **FINRA**. I had sort of gotten bitten by that bug to marry this concept of this open communication into a very tightly regulated industry.

So eventually I ended up back in Michigan. It was about a year and a half ago that I accepted the role and I haven't looked back.

Matthew: So when the Red Wings initially contacted you that was thanks to your online activities, they just noticed you online from your blogging and things like that?

Shannon: I think it was a little bit of both. I think it was a lot of because I had this presence and who am I? I'm just some girl that lives in Detroit and they're a big sports team with a really passionate fan base. So I think that was a big part of it, that obviously I had proven that I knew how to use the tools.

I think the other part of it was having the day job. I think it was a little bit of both. I don't think had I just been out there blogging and not had any sort of professional experience, I don't think that would have been appealing to them. I had five interviews before they made an offer, if that tells you what I went through to get that job.

Matthew: It sounds like they really made you work for it. So you said you had the day job first, so you were doing social media planning and there were things that just went beyond your social media activities online.

You came to my attention, of course first seeing you on Twitter and Ann Handley had mentioned you with regards to social media strategy. So I was reading on your blog and you've had some very popular posts there about social media strategy. I think one of the things that was interesting to me is I know I always say when people say the word strategy or "we need to be more strategic" I'm pretty sure I don't know what they're talking about. I even sometimes think they don't either.

So before we start talking about social media strategy I was wondering if you could first define for us what you think of when you hear or use the word strategy.

Shannon: Well, I hear two things. The first is you could say that strategy is like the how you're going to approach something. I usually say it's really about the spirit with which you approach something. So it's like what kind of a tone of voice, a feeling, are you approaching your strategy, I guess for lack of a better word, your plan with. So it's really being able to articulate that vision in the spirit with how you're going to approach your plan.

Then the other piece is about organizational alignment. That really is the key to unlocking what kind of approach you need to have. So organizational alignment sounds easy, but it almost never is. If you're taking it in a theoretical space and talking about organizational alignment, of course we want to have more sales, we want to attract customers, we want to do all these things, we want to generate leads.

Those are all great, but we like to say that all customers are our favorites, but really there's usually a lot of research that goes into identifying who the best ones are. If we speak in the right way to these best – whenever we do segmentation studies or anything like that, when we identify who the best people are and we identify our targets, we know that that target audience likes to be spoken to in a certain way, they're interested in certain things.

So how do we align with that audience, but then how do we align in a way that also aligns with our organizations objectives? What do we want to be known for? How would this brand live and breathe, how would it sound? Would it be humorous? Would it be luxurious? Would it be highbrow and well educated? Would it be down to earth?

We have to think about all of those things whenever we think about communicating to our audience the way they communicate and in a way that is true to being aligned with the brand and the organizational goals.

Matthew: The first thing that occurs to me when you talk about, and I'm skipping straight to this notion of organizational alignment, it would seem to me, because I want to discuss the challenges that go into developing a social media strategy, if the strategy is about organizational alignment I assume that actually aligning different parts of the organization is one of the first challenges that people encountered strictly speaking, because social media isn't usually starting from the top. It's not exactly bottom up, but it's usually starting from within some particular silo.

So given that, what are the steps or what are some of the steps that someone has to take in developing a social media strategy when they're not really the decider and in fact they maybe kind of have to not just influence down and across, but also up?

Shannon: That's a good point. It does start in the middle and quite often is usually is you exist within a department somewhere. In my case it's corporate communications. Sometimes

it's within marketing, sometimes it's within customer service or operations or the web team. It can start in any place.

The first place it usually makes sense to align with the goals of your department. That's a good starting place. In most cases your department strategy should also align to a larger corporate strategy. We don't want a communication strategy that is at odds with our service strategy.

We want to make sure that all of these things are aligned. And you're right, from top to bottom and across and in every direction. So that is a challenge in a lot of cases. Or just getting clarity around what some of the defining characteristics of each sort of silo strategy, as you put it, how does it fit.

But, yes, the best place to start is usually aligning within your own silo and then connecting to other areas. Social media is a disruptive technology because it changes how things are done. I think a lot of times when people bring in somebody to handle the duties of social media because it's so work intensive, they kind of envision having somebody on the front lines that everybody else tells them what to write, what to post, what to say.

And what ends up happening in those cases is that you end up repurposing a lot of stuff that is inherently not conversational. You end up repurposing brochures, you end up repurposing press releases, you end up just repurposing a lot of stuff that was really never intended to have a feedback mechanism.

So what ends up happening is a lot of times the person on that front line ends up turning around and saying, "Actually, no, I'm not posting this. Here's why. Here's what I need instead." It's disruptive in a sense that people who are not used to having somebody on the front line turn around and say, "No, this isn't going to work for this channel." That's not always an easy conversation to have, but that can't be the end of the conversation either.

There has to be a solution. A lot of times the solution has to start at the beginning. It has to start when products are designed, it has to start when communication strategies are put together. Social media can't just be an add-on thing that's like "At the end of this, who is going to tweet about it?" We have to think about having things in place that are inherently tweetable.

We have to think about doing things in the social space that we can then leverage in different channels. Like American Express now is pulling in Twitter conversations into their television ads. So it has to be sort of an ecosystem and integration really is the key. So organizational alignment has to start with where you live and then usually you kind of spread out beyond that based on where the needs are.

Matthew: You started talking about saying no to people. This is something you had said in one of your blog posts, which was as part of when you're developing this organizational alignment and developing and rolling out a social media strategy that sure, you have to negotiate with people, but that sometimes you have to ruffle feathers. Is that what you were talking about, this kind of pushback and saying no to people as a ruffling of the feathers?

Shannon: Yes. And I try to say it nicely, because like I said, the thing is that it disrupts what other people have to do in their day to day. That's a big deal to a lot of people. So it's not something that should be handled too lightly. You need to be nice about it, but you can't be afraid to say, "No, this isn't going to work for this channel." because now you're in the role of being a sort of gatekeeper.

When you're out there trying to make these things into conversation and to raise the issues that are connected to your brand or your product or whatever it is that you need to be out there talking about, it's picking the things that need to be right. So you have a duty as a gatekeeper to not only make sure that you're aligned organizationally, but that also you're speaking in a way that is good for the channel.

And when I say the channel I could be saying Twitter or Facebook. So it's not enough to think about, "What is my brand and how do I represent that?" You have to also think about "What is my brand's role in this place and with these people? What am I there to do?" Because it's not just about being how the brand would be on your corporate website, it's about extending the reach of the brand into these other online spaces where you can have conversations with people.

Matthew: Just because you used the word be there, I wanted to come back to something you had also said about this key component of creating organization alignment. You wrote that it's not just about outlining the actions that need doing, we need to set up a Twitter feed, we need to be posting regularly blog and that sort of thing, but explaining how the organization has to be in order to be successful.

So when you have that kind of conversation with people where you're trying to communicate that within the organization, what are you focusing on, how do you talk about how the company needs to be?

Shannon: I think, first of all, it's we need to be open, we need to be open to feedback. A lot of times people want to shy away from negative comments or negative feedback, but really that is a gift.

Ten years ago you would have to pay a lot of money to be able to find that sort of feedback. Not that there's no investment involved, but now it's like you really just have to listen and you

can gather up a lot of stuff. I think that surveys and focus groups and things like that are great tools, but social media gives you this ability to sort of observe people in the wild. You can observe them in their natural habitat having conversations that they didn't really intend for you to hear.

So there's a lot of intelligence that can be gathered that way and that's extremely valuable, and we have to treat it as such. To take a lot of the sting out it's not like somebody is saying, "You're doing a bad job," maybe you are and maybe you're not, but that's irrelevant. What it is it's like how do we make a better experience for this person and how do we make a better experience for our customers.

That's something that is extremely important and shouldn't be taken lightly. So I think there has to be sincerity involved. We can't just think about, "We want to be in social media so that we can advertise to people." There's a reason that advertising costs money. Paid channels you get to put whatever you want out there. This is another form of earned media, so we have to think about how do we earn people's attention.

That pushback is a natural thing, I think, that occurs for somebody like me, because I think that if we go out there and we're just repurposing a lot of stuff and we're not really creating genuine conversation around the things that are important to this company, that are important to our customers, then we're misusing the channel. That in some ways is worse than not being there at all.

So it's important to raise that and just treat it like an educational opportunity. It's like you get to talk to somebody about how your channel works and how it's different and how if we want to use it successfully that there's going to be some additional items that need to occur on the backend moving forward.

Will it hurt me if I go out and tweet something that might not be completely conversational and add value to this channel? Probably not. A lot of times I'm like, "Yes, we can tweet that. But, next time let's work together from the beginning and see how we can make sure that there's a communication strategy in place that's going to be conducive to generating that sort of natural word of mouth that we want to occur."

Because at the end of the day in social media it's not what we say about ourselves all the time, it's what other people say about us and how do we sort of help inspire that to go in a direction that we want it to go in.

Matthew: What are things that people can do to make their social media engagement more conducive to this conversation and to sort of earn the right to participate in a

conversation with people, but also to draw out those folks so that in a sense the conversation is going in the direction that you want it to go in order to fulfill your strategy?

Shannon: A lot of times it's around creating content that is educational in nature. We know this. People are doing research online all the time. Or entertaining. It's about what are the ideas that are inherent in this announcement or this thing that we're trying to do. What's the storyline, how do we create a story out of this that is compelling? And making sure that it's something that, again, you want to think about what are the overarching storylines of our company, how do we tell these as stories.

Actually, the person I work for Andy Hetzel is my boss's boss, he says that we need to think about everything that we do in the case of a story because facts are sort of like disparate pieces of information. Facts are important and our stories need to be based on facts, but if we just put a bunch of facts out there, there's no context.

So it's really about those sort of interstitial things that when you put these facts together what's the story. Thinking about things in terms of issues that are connected to that story, creating conversation around them because people remember stories, first of all, they also care about things that are important to them. So being resourceful, giving them the tools that they can use to make their lives better. Those are the things that people care about.

When you say something is important for you as a company or as a brand, me as a consumer I'm hit with so many different messages, but if you tell me a good story I'll remember that.

Matthew: I think that makes perfect sense. People do talk about storytelling and the importance of storytelling. People talk about it a lot, but I like the way that you were framing it in terms of you can put out a lot of information and you can put out a lot of facts. The story is how you weave these together into something that speaks to people that they're going to remember, they're going to recall and ideally pass on.

I'm wondering if you could talk a little bit about this, is there a tension between a business branded presence within social media and the imperative, as you put it, to be human all the time?

Really the discussions of transparency and you mentioned sincerity as key to participating in social media, that you're supposed to be a real person. Yet sometimes we leave parts of ourselves at home when we go to work and there are norms of behaving in the workplace that don't necessarily apply when you're at a party with your friends or really living it up at a Red Wings game.

So I'm just wondering how do you recommend that people navigate the necessity to be human and sincere, as you said, but also the necessity to be professional and also sort of goal directed the way you have to be when you're representing a brand online? Does that make sense?

Shannon: Yes, it does. I think that is something that is sort of difficult. And I think that a lot of us we have to self censor. We have to be aware of a lot of the implications of things that we do. I'm a professional and I work online, so I tend to treat the online world as my workspace in a lot of ways.

But, when I say "be human," if you're just telling me what your title is, if you're very official in your tone, if you're saying things like "we are pleased," which is often used in quotes and releases and I understand the reason for official tones and I think there's a place for formality and there is a place for formal communication.

In the online space, in social networks, in blogs it doesn't work so well. People feel like you're clocking in and talking to them and you're talking to them in a way that is not meant to connect, but in a way distancing where other people are connecting. And it sticks out.

So when I say be human it's okay to say if you're working in a regulated industry and somebody is asking you something directly that for you to answer it would be in violation of the law or in violation of some regulation or rule that you have to adhere to when you talk to them, I think it's okay sometimes to say, "I can't answer that here. And here's why." That's a human answer. That's letting people know that you're having to operate within some boundaries and I think we can all relate to that.

But, it's better to acknowledge that than to either ignore it or to give them a canned response. That's, I think, what I mean by being human. I think a lot of times even just the way you position yourself and your avatar, if you're on official business I think you should absolutely include your title and your contact information and all that stuff, because if I'm a restaurateur and I'm responding to a bad Yelp review knowing that I'm the owner, "Here I am, here's my title, here's my full name," I think that's appropriate. It wouldn't be appropriate to be Jenny9799 in my response using some kind of a username.

But being human is about empathizing. Most people because they're talking online whenever they're blogging, whenever they're responding to another person's blog, when they're on Twitter or they're on Facebook, they're talking because most of the time they want to be heard. And if they're complaining about a company they certainly want to be heard. And if they're complaining to you about your company they definitely want to be heard and they want you to hear them.

Letting people know that you hear them, “Hi. I’m showing up, I’m listening to you, I’m validating what you have to say by listening. Here’s what I have to say. Here is our company position and here’s what that means.” But, it’s me explaining to you in my words what that means. That’s what I mean by being human.

It’s okay to have a sense or of humor, it’s okay to like sports. Or like me, I like really inappropriate humor or The Muppets or I like looking at funny pictures of cats and I don’t hide that.

Matthew: I think we all do. I think that’s what the internet has proven.

Shannon: Yes, that’s the universal law. We all like looking at funny pictures of cats.

Matthew: You’ve got a lot of ideas and you’ve expressed them very articulately, Shannon. I almost hate to say that we’re almost of time, so in fact I won’t say that and instead I’ll get you talking for another length of time with one final question.

You wrote once, “Focusing on the strategy piece requires mental discipline. You must keep your focus on what is truly essential without getting caught up in the tactics.” And that’s how you stay out this “Will you tweet this for me” kind of thing. My question to you though is what is it that you do to maintain this focus on what is truly essential?

Shannon: I think it helps to write it down. Then you can always go back and look at it.

We have a great site where I work, we have a great blog called A Healthier Michigan, it’s at **AHealthierMichigan.org**. We get pulled in a lot of different directions, which is great. People pitch us, which is fantastic. We get PR pitches, we get people submitting their events for community events to this website. A year ago I was hoping and dreaming that this would be happening.

So we’re constantly having to think about what fits here and what doesn’t. We’re constantly having to sort of reassess that. We’ve actually scoped out, we not only have an editorial calendar, but we also have a document that looks at the voice of the site and the sort of things that are in. And if it’s not in that sort of framework then we have to say no sometimes or we have to say, “This would be okay, but we have to make sure this is a part of it.”

The content on the site is really about health and wellness, but it’s also about community. So it’s about community health and wellness and it’s about all the things that make Michigan a great place to live. So sometimes it’s about doing business profiles and talking about things that are innovative. A lot of times it’s about diet and exercise and staying motivated.

But, sometimes we do things like we'll put together an A to Z list of all the Michigan breweries. Some people might say, "But, it's beer." And I'm like, "But, we're focusing on businesses and hand crafted beers throughout the state that people are really putting a lot of heart and soul into." We're not saying that anybody should go out and get drunk by any means or we're not saying people should drink beer all the time.

But, putting together a guide like that, I think is really useful for people who are enthusiasts or people who really love the state and want to get a sense of what it has to offer. Or if you're going up north on a vacation for a long weekend and you want to take in some of the local color, I think spending time tasting a locally made beer is a great way to do it.

So we do allow for that sort of thing. But, then if somebody wants to submit a health and wellness article and they don't live in the state, they have no connection to the state, then we say no. So we have to think about what's right for the publication and what makes it special. And what makes it special is that we're talking about a lot of things that maybe sort of generic in the sense that they're widely available.

We have a dietician named **Grace Derotia** who writes for that site and she is on our staff. The only place you can get what Grace Derotia believes and Grace Derotia's take on a lot of the advice that's out there is on our site.

So that's what makes it special is that we're localizing these things, we're personalizing them and that is what we have to stick to. And even if something maybe from an editorial perspective would fit in, but if the person or the subject matter doesn't have a really strong local tie then we have to say no.

Matthew: First of all, that sounds great. I'm just going to go on the record saying how much I love Michigan. I was born in Ann Arbor. Go Michigan. Second of all, I think what you said at the outset too, and it occurred to me as you were describing this whole process, which illustrated your point very well, was as you said, write it down.

If you want to focus on what's truly essential you really have to articulate to yourself and to your community what is truly essential. One way to do that and set it in stone is "Here's our statement," or editorial policy, or vision for this site or for this company. So that makes perfect sense to me.

Shannon, that's all the time we have right now. Hopefully I'll be able to get you back on here at some point. Before we go I wanted to give you a chance to let people know if they want to find out more about your thoughts on social media, social media strategy, great local breweries, where should people look?

Shannon: They can always find me on Twitter, I'm @ShannonPaul. My blog is VeryOfficialBlog.com and I write about social media strategy for business. I haven't written that much this year, but I'm hoping to get back on the wagon in 2012.

If they want to see my work in action they can always visit AHealthierMichigan.org and they can see what we're doing with social media at Blue Cross Blue Shield of Michigan.

Matthew: All right, great. Thank you so much for joining us on Marketing Smarts. This was a really great, really interesting provocative conversation. I also appreciate that you used the words zeitgeist and interstitial.

Shannon: I'm such a nerd.

Matthew: That's quite all right. Thanks again, Shannon. And thank you, listeners, for listening to Marketing Smarts here to the very end. This is Marketing Smarts, a podcast brought to you by MarketingProfs. I've been your host Matthew Grant. Talk to you next week.