

# Digital Marketing Strategy Guide

How to plan & execute, measure & analyze  
actionable steps, templates, checklists,  
and real-life examples



[TALKWALKER.COM](https://www.talkwalker.com)

*Do you hear that?*

*That insistent buzzing in your ear?*

*You're not sure what it is, but you think you should be listening. You think it might be important. Not in a life or death kind of way, but you think it's about your brand.*

*But, you're unsure what to do.*

*You're afraid of ignoring a plea for help. You're afraid of missing a negative comment. You're afraid of ignoring results. All because you weren't listening.*

*So, you do nothing.*

*You sit at your desk and tweet with fingers crossed. You post your blog and long for engagement. You stare at results and pray for enlightenment. Is this how it has to be?*

*No.*

# Introduction

How do we plan and execute, measure and analyze our digital marketing campaigns?

That's an impossible question to answer with a single solution. The short answer? Read this eBook. The long answer? Seriously, read this eBook.

Picture this...

Your boss asks you about next year's digital marketing campaigns. What are you going to say?

"Well, we looked at last year's campaigns and they all look awesome. We increased engagement by 20%, website traffic grew by 25%, and Twitter followers are up by 15%. So... we'll probably go with the same."

Baloney!

Do you know what this even means? Which campaigns brought these wins? Can you prove it, and then replicate it? What was the ROI? What are your competitors doing? Did your customer base shift? Are last year's campaigns still relevant?

These are the questions your boss wants answered. Fluff won't do.

This digital marketing strategy eBook will help you plan, execute, measure, and analyze your marketing campaigns. How to report on last year, choose your targets, set your KPIs, and monitor the results. It's packed full of practical and actionable steps, templates, checklists, and real-life examples.

There are brainstorming best practices, how to find customer insights that have value, how to write your vision and mission statements, SWOT analysis, TOWS analysis, and finding SMART goals, identifying your share of voice, and analyzing results.

***Learn to listen, listen to learn.***

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# From marketing strategy to marketing plan

*Creating your marketing strategy is a challenge. Your first challenge. Your second, is drawing up your marketing plan. Together, they'll guide you and your team towards determining your goals, finding your voice, targeting demographics, analyzing competitors.*

*Working with USPs, KPIs, and SEO. Launching successful marketing campaigns. From marketing strategy to marketing plan. I'm going to show you how it's done...*

I'm going to walk you through developing your marketing strategy. Then, I'll explain the five steps to creating your marketing plan. You'll find practical and actionable steps, working templates, and real-life examples.

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## What is a marketing strategy?

Let me point out that if you get to the end of this guide, draw up a cracking marketing strategy, then put it in a drawer and forget about it... you'll be doing yourself no favors. You should refer to it regularly. Everytime you plan a campaign, launch a new product, work with an influencer.

It's your long term game plan. How you're going to reach out to people. How you're going to turn those people into customers. How you're going to create your marketing plans.

A comprehensive marketing strategy will include your value proposition - your competitive advantage in the market. The demographics of your target audience, key marketing messages, your tone of voice, etc. Your marketing strategy is a constant from where you create your marketing plans. Now and in the future.

**Marketing strategy => marketing plan => execution => win!**

Look up strategy in a thesaurus and one of the synonyms up for offer is - plan.

But, that's not quite right when we're talking about marketing:

### Marketing strategy | What | Thinking

The big picture. Your USPs, brand messaging. A breakdown of the goals you're looking to accomplish with your marketing efforts. Your strategy is determined by your business goals.

### Marketing plan | How | Doing

How you're going to deliver your key messages. Which platforms. The schedule. Your marketing plan is how you intend reaching your goals. A roadmap that will direct you through each step. From where you build your marketing campaigns.

#### **Example:**

**Objective** = to expand your business outside of Europe to an international market

**Strategy** = engage and target a global audience

**Plan** = create a personalized marketing campaign that reaches out and engages with specific segments - language, buyer behavior, purchasing habits

## Why do you need a marketing strategy?

### *Simples.*

It's a roadmap for you, your team, and your business to follow. It will help you measure results against your goals. Target the most appropriate consumers. Help you appreciate the impact your marketing campaigns have on your brand. Your long-term marketing strategy will develop a sustainable competitive advantage. It's all your marketing goals in one place. You'll have done extensive market research. You'll be focusing on the best product mix so you can achieve maximum profit and grow your business. Your marketing strategy is the foundation of all your future marketing plans.

### *Important stuff.*

#### **Your marketing strategy:**

- Explains your objectives and how you're going to execute them
- Formalizes ideas and concepts
- Identifies your target audience - purchasing power, behavior, demographics
- Defines how you're going to market your products and services
- Helps you obtain financing
- Keeps you on track

#### **A successful marketing strategy will:**

- Win new customers
- Increase sales
- Encourage your existing customers to spend more
- Support the launch of new products and services
- Better establish your brand on the market and increase market share
- Confirm your tone of voice and brand identity
- Reduce churn and strengthen customer loyalty
- Support the launch of advertising, PR, PPC campaigns
- Guarantee your business stays focused and current

To build an effective marketing strategy that'll support future marketing plans, you need discipline, time, and focus. The process is challenging, make no mistake. But, you don't have to start with a blank sheet, this digital marketing strategy eBook will lead you to success.

## Developing your marketing strategy

*Establish a clear path of action.*

Your strategy, if a comprehensive one, will be around long-term. At the same time, you have to remain open to changes and improvements if for instance, your competitors take a new direction, you take a new direction. Flexibility is the name of the game.

Let's take a look at how to start writing your marketing strategy:

### Analyze your business

- Objectives and how you'll reach them
- Strengths and weaknesses of team, business, products, services

### Analyze your market

- How big is it?
- Your growth expectations
- Customers' behavior and spending power

### Analyze your competition

- Monitor their messaging, marketing campaigns, social channels, products
- Their strengths and weaknesses compared to yours
- Compare pricing, customer support, sales channels, customers demographics, messaging, etc.

### Identify your customers

- Segment your existing and potential customers according to what they want from your business - high quality products, low cost, 24/7 customer support, location, etc.
- Once you've segmented, compare your positioning with that of your competitors - customer support, cheaper/more expensive, fast to market, targeted countries, etc.

### Analyze your products/services

- USP - what makes your product or service unique?
- Benefits - check out your segments as it's likely they'll be looking for different things - price, location, etc.



**How will you broadcast your benefits?**

- Website
- Blog posts
- Social media
- Email campaigns
- Promotions and offers
- PR
- Paid ads
- Events and trade shows
- Traditional press
- TV and radio
- Word of mouth

Having agreed your marketing strategy, you're now ready to build your marketing plan, and launch campaigns. Your plan will identify budgeting, deadlines, key team members, channels, etc.

Remember what I said earlier, about having a flexible strategy? Your plan, more so. Suppliers increase their prices, team members move on, economies change, markets shift. Be ready to update.

## Presenting your marketing strategy

*Ready to present your marketing strategy to the board?*

Your strategy - your business model - will define your objectives and business goals. You'll win new customers, boost sales, strengthen your brand value, and increase your ROI. Your marketing strategy will help focus your team's efforts. It'll be the foundation on which you build future marketing plans and campaigns. And, determine how you should spend your budget.

*You must be honest, you must be brutal.*

Look at your business and find your strengths and weaknesses, your value proposition, your competitive advantage, your target market. When your board asks, you need to be ready to answer these questions:

- What's our ideal customer?
- What value do we bring that benefits the market and differs from our competitors?
- How do you want consumers to see us, our personality as a brand?
- What's the ideal customer experience? How will you achieve it?
- What's our core message that explains who we are, what we offer?
- How will you make the market aware of our brand?
- What revenue sources do you suggest we use to expand our business?
- How will you nurture consumer trust in our brand?
- What partnerships will you be working towards to make your strategy work?
- What will be the end result if we follow your marketing strategy?

You'll have to prove you've done your research. That you understand your target market, customers, competitors, budget, and costs.

Measuring performance is a given. KPIs should be determined so you can measure the marketing effectiveness of your content - tracking email subscribers, email engagement rate, site traffic, time spent on your website, etc.

## Marketing strategy => marketing plan in 5 steps

*Okay, marketing strategy agreed, time to work on your marketing plan.*

Here are the five tried and tested steps that'll help you create your next marketing plan:

- Step 1 Reporting on last year's marketing plan
- Step 2 Generating ideas
- Step 3 Setting your goals
- Step 4 Choosing your strategies
- Step 5 Planning next year's marketing plan

### Step 1 | Reporting on last year's marketing plan

There are two reasons to report on last year's plan:

#1 - You'll be asked to demonstrate how you dealt with the priorities for the year, to show the big picture. What was the ROI? Were the results good or bad, targets met, goals achieved? **Don't get lost in details, you just need to show the bottom line.**

#2 - If you don't review your marketing plan and all your campaigns, how will you know whether they're working. Should a campaign be dropped as a non-starter? Would a campaign improve if tweaked? Are people engaging with your messaging? If you can't answer these questions, you won't be able to plan future campaigns successfully.

#### Understand your current position

*Why do you need goals?*

If you don't know where you want to end up, how will you know how to get there and whether you've arrived or not?

To set achievable marketing goals, you need to evaluate your current marketing plan. What's working, what's bombing?

*Example: If blog traffic has increased by 10% for the last six months, a 15% month-over-month target is challenging, but not impossible*

**Objectives vs results**

What were your business goals? They could include:

- Boost sales
- Increase brand awareness
- Enter new markets
- Raise more revenue
- Reach new audiences
- Get funding
- Increase profits

Fine-tuning your marketing goals could be:

- Increasing newsletter subscribers
- Getting more traffic to your website
- Improved conversion rates
- Earn more followers on social media
- Email - increase open rate, click-through rate, bounce, unsubscribes
- Social media - growth of followers, engagement, post reach
- Paid search - click-through rate, average cost-per-click, conversion rate
- SEO - improve keyword ranking & page ranking, backlink acquisition, domain authority

What did you do? Did you start a social media campaign? Optimize/repurpose blog posts? Initiate an SEO strategy? Take a look at the more specific examples below:

*Example 1*

- Goal - to increase monthly traffic to website by 11%
- Result - an increase of 15% due to strong second quarter and success of campaign X

*Example 2*

- Goal - to get 30% more newsletter subscribers
- Result - 22% due to blog CTAs that were only fixed in Q4

*Example 3*

- Goal - to increase number of followers on Twitter by 10%
- Result - 12% increase due to competition run during Q3

## Quantitative analytics vs qualitative analytics

### *What worked and what didn't?*

To answer this, use qualitative and quantitative analytics. I'm sure you know what they are, but just in case:

**Quantitative analytics** - looking at figures to get hard data on how consumers behave

**Qualitative analytics** - putting data into context to understand why consumers behave a certain way

What were the results of your previous marketing campaigns? Reporting on your campaigns effectively, isn't always easy, but it's vital that you have a high-level overview. You can then summarize what worked and what didn't.

This free **campaign management cheat** sheet will help you report on your campaigns. It highlights best practices and the metrics to prove campaign performance.



**Download Now!**

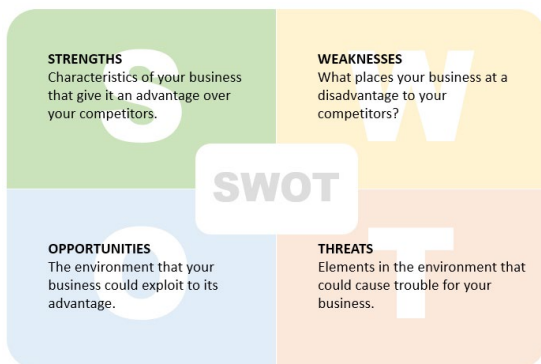
**Campaign Management  
Cheat Sheet - report on your  
campaign performance**

## SWOT analysis

*SWOT is old school. But it works.*

SWOT refers to strengths, weaknesses, opportunities, and threats. It's a comprehensive audit that helps you identify the internal and external factors affecting your team's future performance. What differentiates you from your competitors. Strengths and weaknesses are internal factors, opportunities and threats are external.

If performed with brutal honesty - no point otherwise - this analysis will be a vital part of your planning process in which financial and operational goals can be set for the upcoming year, and campaigns can be created to accomplish these goals.



Old school marketing - SWOT analysis.

For constructive SWOT analysis, you have to be brutally honest about the good and bad points of your business. Most of the information is subjective, so keep it simple.

### What are your strengths?

- What makes your team awesome?
- What advantages can your team leverage?
- What quality or cost effective resources are available to you but not others?
- Which factors result in definite sales?
- What do your competitors consider your strengths?
- What are your USPs?

E.g. your team, strong brand, loyal customers, healthy balance sheet, unique tech

**What are your weaknesses?**

- What internal processes need improvement?
- What do customers say needs improving?
- What technology limitations do you suffer?
- What factors contribute to loss of sales?
- What do competitors see as your weaknesses?
- What activities should you avoid?

E.g. brand perception is weak, out of date technology, skills lacking, slow to publish content

**What are your opportunities?**

- Are there any trends you could follow that you'd benefit from?
- What isn't your competition doing that you could - content, ads, markets?
- Are there any good opportunities on the horizon?

E.g. cross-selling, entering new markets, offer new services, partnerships/co-branding, competitors late to jump on trends

**What are your threats?**

- What are your barriers, what's stopping you achieve your goals?
- Has a technology change made your product obsolete or less favorable?
- Are your competitors working on better products, services, content?
- What are your competitors doing that you're also doing?
- Do you have cash-flow or debt issues?

E.g. customer choice, new competitors in your industry, new products launched, channel conflicts, economic downturn, competitors outranking you in search engines

**TOWS analysis**

*SWOT analysis finished, now it's time for another acronym - TOWS.*

TOWS analysis shows you how to exploit your strengths to maximize your opportunities and minimize threats. Or, create strategies to minimize weaknesses by taking advantage of opportunities and minimize weaknesses to avoid threats.

		INTERNAL FACTORS	
		Strengths (S)	Weaknesses (W)
EXTERNAL FACTORS	Opportunities (O)	Strengths/ Opportunities (SO)	Weaknesses/ Opportunities (WO)
	Threats (T)	Strengths/ Threats (ST)	Weaknesses/ Threats (WT)

TOWS analysis - be honest or you're wasting your time.

When you start planning a process, you'll perform a SWOT analysis. A TOWS analysis helps you work out how to move forward.

There are four TOWS strategies:

- Strengths/Opportunities (SO) - strengths exploiting opportunities
- Weaknesses/Opportunities (WO) - overcome weaknesses, exploit opportunities
- Strengths/Threats (ST) - exploit strengths to overcome potential threats
- Weaknesses/Threats (WT) - minimize weaknesses to avoid possible threats

*Results of a TOWS analysis will depend on how honest you've been with your data. Just saying...*

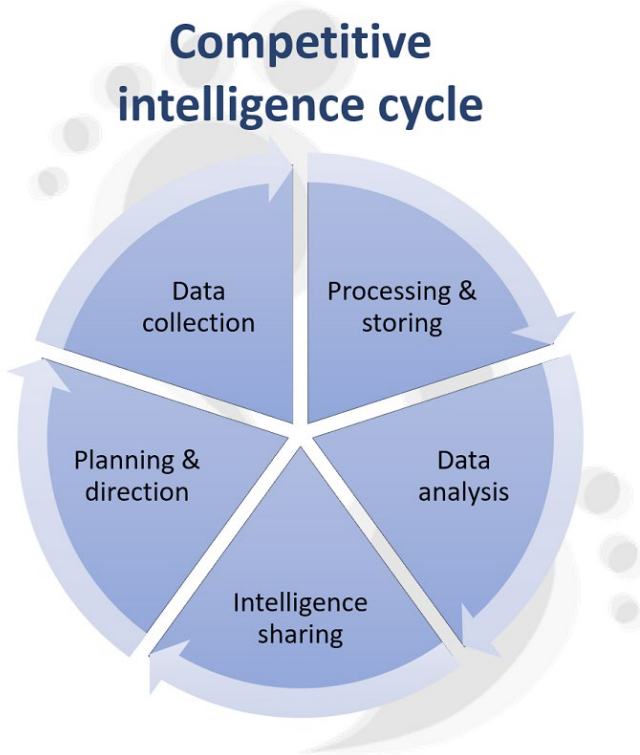


**Competitive intelligence**

*This is a biggie, and if you're so inclined, I've a [competitive intelligence guide](#) you can check out. It's full of techniques, real-life examples, tools, and templates.*

Where do you rank compared to your competitors? Why are they outranking you? How can you outsmart your competitors?

Competitive intelligence data feeds both your marketing strategy and your marketing plan. Understanding the competition will bring new ideas and fresh insights to inspire you and your team.



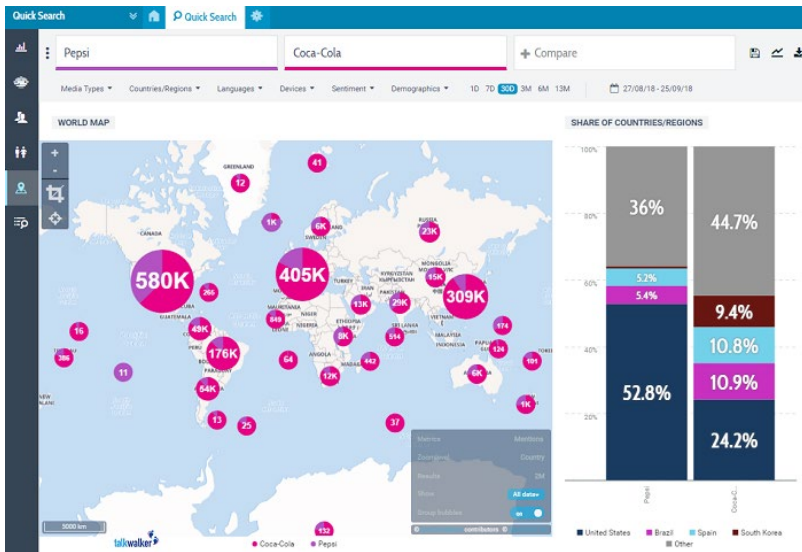
Competitive intelligence cycle.

## FROM MARKETING STRATEGY TO MARKETING PLAN

### Information => intelligence => action

- **Information** is where you start - data about competitors, stats, company info, product intel, marketing strategies
- **Intelligence** is info that's been analyzed, with insights squeezed out to enable decision making, such as whether to discontinue a product or which audience segment to target

Your brand doesn't exist in a bubble. You must consider the broader competitive space. You must gather, analyze, and share intel about new products being launched, price cuts, new audiences, and emerging competitors. Insights into the competition will help your brand grow, protect your brand from extinction, and improve your marketing campaigns.



Quick Search competitive intelligence analysis. Coca-Cola has a 9.4% market share in South Korea. CI reveals a country that Pepsi should target.

**Here are four ways competitive intelligence will help:**

**Understanding the competition** - analyze and put into perspective to feed your marketing campaigns for the future. You'll also discover how they're performing and why customers choose them over other brands offering similar products. If you don't understand your competitors, what they're doing, how will you compete and win?

**Identify best practices** - are they creating marketing campaigns that are proving more successful than yours? Does their website bring in more traffic, more sales? Are their email campaigns more punchy? Do they have more social media followers? Are they using more/different social networks that are proving successful?

*Look, learn, win!*

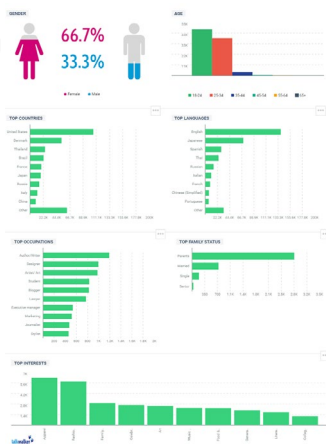
**Find strengths and weaknesses** - how will their strengths threaten your company? How can you take advantage of their weaknesses and find new opportunities. I'm not suggesting you jump in their grave, but...

**Review and update your ideal customer profile/target audience**

**Understand your target audience.** How they communicate. Where they communicate. The demographics - gender, job title, location, interests, language, pain points. What they're spending their money on, etc. Getting to know your audience means you'll be able to create content that they're eager to engage with. Launch products that they're desperate to buy.

The goal is to **attract new customers** that are like the best ones you already have. Look at your existing customers and identify what makes them profitable, loyal, engaging, and fun to work with. Confirm that the ideal customer profile and marketing personas established last year, are still accurate.

Compare the results from last year with the results from this year. Did the data change? An increase in female customers? Different age bracket dominating? Depending on the results, you can **target your marketing campaigns** to take into consideration possible changes, ensuring you're still targeting the correct audience. Take a look at all the demographic information you can pull out.



Audience demographics.

## Step 2 | Idea generation

*Let's regroup.*

- You've compared last year's objectives and results - what worked and what didn't
- Your SWOT and TOWS analysis are done and you've been brutally honest - painful, but worthless if you aren't
- Competitors have been checked out - hey, they're checking you out too - be flattered
- You've established that any changes in your customer demographic will be reflected in your new marketing strategy

*Now let's go crazy! Or, in industry terms, let's start planning.*

### **Brainstorm to find new perspectives & define problems**

*Last year's marketing plan worked like a dream.*

But, what worked last year, isn't necessarily going to work in the future. The pace of change is rapid, and you need to be able to adapt your plan if necessary.

Since you drew up last year's marketing plan, you've launched new products, your competitors have launched new products. There have been changes in your industry, your customer base has shifted, your competitors have announced new partnerships. Your marketing strategy needs updating before you can launch any new campaigns.

Okay, you've updated your marketing strategy. It's now a relevant, working business model. It's time to start using it to create your marketing plan campaigns.

Brainstorming is for problem solving, generating new ideas, encouraging cross-functional communication, identifying your competitive advantage, and for promoting innovation.

When you brainstorm as a team - a white paper, a blog post, a webpage, a video, an event, a product launch - it strengthens your team, cultivating a feeling of team ownership.

### **Ignite the little grey cells**

*To generate new, creative ideas and solutions with interaction and group chat. So, who do you include in your brainstorming?*

Invite all those who'll be directly involved with managing and implementing your marketing campaigns. That could include content writers, market ops, community managers, graphic designer, demand generation, UX designer, email campaign officer, SEO and SEM specialists.

But, if you've launched new features, input from the product team would be helpful. If you're targeting a new country, sales intel would be great.

### **Preparation**

There is no preparation, you start with a blank canvas; no researching, no preconceived ideas.

### **Think outside the box**

*Yeh, sorry, I hate that expression too. But this time, it works.*

- Forget what you know
- Encourage crazy ideas
- Build on the ideas of other
- Criticism kills brainstorming stone dead
- Use visuals
- Quantity is good

*Nothing kills the energy in a brainstorm quicker than calling an idea stupid - it's a real cheap way to prove your own superiority.*

## FROM MARKETING STRATEGY TO MARKETING PLAN

### Talk to other teams for customer insights

*Oh yes, like it or not, you're going to have to venture out of your office and talk to people.*

I've already mentioned bringing in product or sales, but it shouldn't stop there. Take advantage of your customer-facing teams - sales, customer support, account managers. Each team has a unique perspective on customer touchpoints, behavior, spending power. Feedback from these teams gives a more comprehensive picture of your customers and your prospects, and how to keep them happy.

Tips for sharing information:

- **Centralize customer insights** - build a database/wiki/intranet to store survey results, market research, support calls, customer testimonials
- **Ask customer** - facing teams to share their findings with back office teams. A bug hunt for dev and a new feature request for product
- **Mix up your teams** - sit a project manager on an email marketer's knee, get marketing to hold hands with support
- **Listen to your team** - encourage feedback from your employees across the board. Anonymous if they're a timid bunch

This is information that you should have already collected for your [competitive intelligence program](#).



What do you see? A challenge or a nightmare? (Cumulus Media)

**Your vision statement - where do you see your team going?**

*This is the heart of your team. The big picture of your overall goals, where you see your team in the future.*

- Here're some tips on writing your vision statement:
- Don't be afraid to dream big
- Be clear and concise
- Let your passion and emotions run free
- Share your vision statement with your team
- You have to be prepared to put in the hours to achieve your vision

Here're some great [Examples of Vision Statements To Spark Your Imagination](#). Brands include IKEA, Nike, and McDonald's.

**Vision for your team**

Keep it simple. Take a look at the image below, that's all it needs to be.

**Vision For My Team**

**Vision:**  
What is the situation of my team going to be at the end of next year if we are successful?

At the end of next year, my team will...

**Reasons:**  
What is driving my team?

talkwalker

### **Your mission statement - where does your team exist?**

A clear, concise declaration about the direction of your marketing, the reason your team exists. Focus on what your team does for the company, and what it wants to achieve. Added bonus, it helps keep your team focused on your objectives. Answer these questions:

- What do we do?
- How do we do it?
- Who do we do it for?
- What value are we bringing?

Take a look at this blog post - [What Great Brands Do With Mission Statements](#). Eight big names and their mission statements, including Google, Amazon, and Virgin.

### **Marketing tools**

*Marketing = tactics, strategies, tools, and coffee.*

We've published several blog posts that list the best tools out there, with industry experts recommending them. The tools you'll need, depend on the campaigns you plan to run. Here're some suggestions:

- [Twitter analysis tools](#)
- [Instagram analysis tools](#)
- [Social media monitoring tools](#)
- [Social media analytics Tools](#)
- [Image recognition tools](#)
- [Social listening tools](#)
- [Competitor analysis tools](#)



## Step 3 | Plan

*You've moved on from crazy ideas, and now it's time to formalize your marketing plan.*

### Your marketing plan

You've outlined your target markets and you've brought the six Ps into play: product, price, people, promotion, place, and positioning.

It's not uncommon for digital marketers to be so reactive, that we run out of time to be proactive. But, it's imperative that we find time to plan campaigns to enable us to achieve maximum profit and sustainability.

Internal strengths and weaknesses identified, external opportunities and threats recognized, you can now build campaigns that play on your strengths, and minimize your weaknesses.

### Identify your assets

What assets do you currently have that you can use to make your campaigns work? These are strengths, so refer back to your SWOT analysis for inspiration.

Here're some examples of assets you're probably already using:

1. Website
2. Blog
3. Email subscribers
4. Newsletter
5. Social media channels
6. eBooks and guides
7. Corporate brochure, fliers, etc.
8. Videos - sales and training
9. Customer and influencer testimonials
10. High page ranking in search engines
11. Solid domain authority
12. Influencers, brand advocates
13. Trade shows, events
14. YOUR TEAM

### Action plans

Action plans - what your team is going to do to achieve your goals. Each plan has to specify:

- What will be done - e.g., email campaign run throughout the year to attract new customers
- Timeline - start, review, finish
- Who's responsible for what
- Cost - e.g., printing, event stands, new team members, travel - estimate based on past expenses
- Measurable projected outcome e.g., 50 conversions, new partnerships or sponsors

### Your team's priorities for next year

Use a template - shown below - to demonstrate how you'll achieve your vision. List your assets - refer to last year's performance and your team's vision.

## | My Team's Strategic Priorities For Next Year

1	OVERALL – How will you achieve your vision?
2	ASSET 1 – What do you want to achieve? How are you going to achieve it?
3	ASSET 2 – What do you want to achieve? How are you going to achieve it?
4	ASSET 3 – What do you want to achieve? How are you going to achieve it?
5	ASSET 4 – What do you want to achieve? How are you going to achieve it?

## Step 4 | Setting goals

*Where we're at.*

You've had a cracking brainstorming session with your team, solved issues, generated exciting new ideas, and cultivated a warm, fuzzy feeling of team ownership.

You've bounced ideas off other customer-facing teams and found new insights.

Vision and Mission statements are completed, and you've checked out some interesting stats. Now it's time to set your goals.

### Specific Measurable Achievable Relevant Timed

Your head may be bursting with exciting ideas, goals you want to achieve. But, you can't pluck them out of thin air. The first step to planning effective and achievable goals is to define your strategic objectives. For this you need to be **SMART**.

S Specific	M Measurable	A Achievable	R Relevant	T Timely
What do you want to do?	How will you know when you've done it?	Can you accomplish it?	Is it worthwhile?	When exactly do you want to accomplish it?
<ul style="list-style-type: none"> <li>Define your goals clearly.</li> <li>Who is involved?</li> <li>What do you want to accomplish?</li> <li>Where will it be done?</li> <li>Why are you doing this (reasons, purpose)</li> <li>What are your constraints?</li> </ul>	<ul style="list-style-type: none"> <li>Can you track the progress and measure the outcome?</li> <li>How much, how many, how will you know when your goal is accomplished?</li> </ul>	<ul style="list-style-type: none"> <li>Is the goal reasonable enough to be accomplished?</li> <li>How?</li> <li>Don't choose goals that are out of reach, or below standard.</li> </ul>	<ul style="list-style-type: none"> <li>Is the goal worthwhile and will it meet your needs?</li> <li>Is each goal consistent with other goals you have established</li> <li>Do they fit with your immediate and future plans?</li> </ul>	<ul style="list-style-type: none"> <li>Your goals should include a time limit. Completed in... month/day/year.</li> <li>It will bring a sense of urgency and improve time management.</li> </ul>

SMART - specific, measurable, achievable, relevant, timely.

- Specific - real numbers with real deadlines: who, what, where, why?
- Measurable - how will you track and evaluate your achievements?
- Achievable - work toward a goal that's challenging, but possible.
- Relevant - do you have the resources to make it happen?
- Timed - when will you achieve your goal?

## Your team's goals for next year

Use a template, like the one below, and list your strategic goals.

# | My Team's Goals For Next Year

1	OVERALL – What is your SMART goal for next year?
2	BLOG - Increase blog subscribers by 60% by Q4 How are you going to achieve this?
3	SOCIAL – Grow your LinkedIn followers to 550k by Q3 How are you going to achieve this?
4	EMAIL – Achieve average email click through rate of 15% by October How are you going to achieve this?
5	PAID - Increase website visitors to 3,000 per month by September How are you going to achieve this?

The key to setting achievable marketing goals is to understand your current position. To move forward, you have to look backwards. Makes sense?

### How many goals?

Your choice.

Some marketing plans concentrate on a single goal, while others have 1-2 core goals that impact the bottom line, and important initiatives or channels. I'd advise against more, as you'll lose focus.

### What type of goals?

Choose goals that you care about, that are authentic, that are achievable. The type depends on what stage your business is at. If you're a newbie company, focus on engagement and listening to feedback to validate your products and your content. Later, focus on growth metrics.

## FROM MARKETING STRATEGY TO MARKETING PLAN

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Avoid these pitfalls:

- Assuming you know what your customers want - You must listen and hear them. This is where I plug Talkwalker's [social listening](#) tool. Seriously. You'll be able to find out exactly what consumers are talking about, thinking about, liking, hating, feeling, sharing - give it a go!
- Ignoring your competitors
- Competing on price alone
- Growing too quickly
- Relying on a small customer base - you have to grow
- Becoming complacent about your product - innovate, innovate, innovate

There's no secret formula that I can share with you. But...

- Keep it simple stupid (KISS)
- Stay focused
- Be authentic
- Load yourself up with data and insights
- Ensure your short-term goals support your long-term goals
- Always, always keep your team in the loop

*Yes, I called you stupid. Live with it!*



FROM MARKETING STRATEGY TO MARKETING PLAN

Step 5 | Planning next year

*Let's pull it all together.*

You've analyzed last year's marketing strategy, checked the figures, and found the ROI. Strategy sorted, goals vs results proved. After an electrifying brainstorm, you've set SMART goals. Quantitative and qualitative analysis has revealed what worked and what didn't. Your SWOT is set in stone, and your competitors' performance has been pulled apart.

Now it's time to pull it all together and prepare your marketing plan for next year. Ensure you've allocated enough resources to achieve your goals - people and money. The size of your budget depends on how much you have to invest, and how quickly you want to see results.

Time to meet up with the board. Present your marketing plan, built on your marketing strategy. Break it down month by month and demonstrate what your team is going to do and how you're going to achieve it.

*Good luck!*

How We Will Achieve Our Goals

OVERALL: GOAL	DETAILS	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
How we'll get there													
ASSET 1: GOAL 1													
ASSET 2: GOAL 2													



# Conclusion

Creating a marketing strategy is not something you do once and never return to. Yes, it's long-term, but it will need adjusting. It has to have a level of flexibility.

I've explained the what, why, and how to create a marketing strategy that will be the foundation on which you'll build your marketing plan and campaigns. Use what you've learned to achieve the goals you've identified in your marketing strategy.

Your marketing strategy and marketing plan will work together. They must work together, otherwise you'll waste resources, you'll lose focus of your targets and goals, you'll kill your team's motivation.

***Keep reading to learn what data to track and how to present your campaign results effectively.***

# Campaign Management Formula

*What were the results of your last marketing campaign?*

*You need to identify what data to track and how to present your results effectively and clearly. Our campaign management formula gives you examples of the data that you should be monitoring, tips on reporting accurately, and how to present it so it's understood.*

## **The Formula**

**Top Line KPIs**

**Overall buzz**

**Share of discussion**

**Analyzing the reaction**

**Influencer impact**

**Global view**

**Digging deeper into demographics**

**Campaign impact**

**Business impact**

**General points to keep in mind**



## CAMPAIGN MANAGEMENT FORMULA

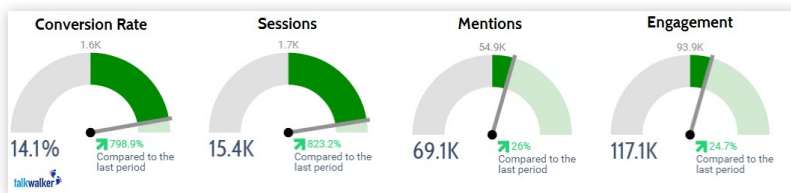
.....

### Top Line KPIs

#### Results in 5 seconds

This is awesome! Data that gives you the big picture. Your campaign's performance, in under five seconds. FIVE SECONDS!!

*Oh yes, that fast!*

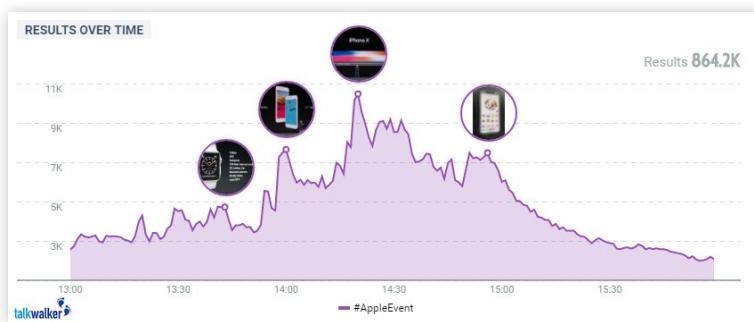


Top tip: KISS (keep it simple stupid). Don't try to add too much information, include only the key metrics that'll give an overall impression of campaign performance. I know, I've called you stupid again.

### Overall buzz

#### Spike analysis

This graph gives an immediate view of the level of interest your campaign generated. It also highlights what got people talking - the buzz.



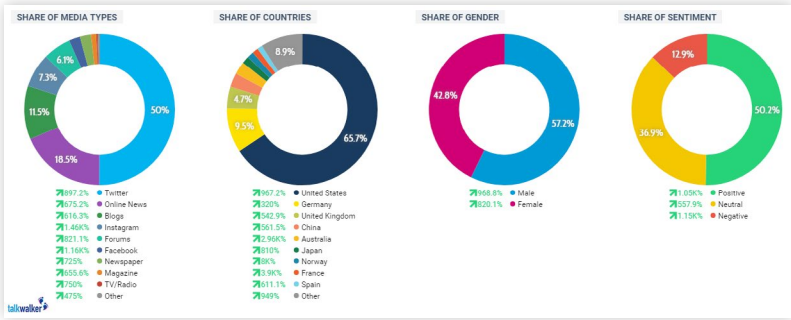
Top tip: using a line or column graph is great for identifying spikes. Adding visual annotations highlights what made people talk about your campaign.

## CAMPAIGN MANAGEMENT FORMULA

### Share of discussion

#### Audience reception

The following results visualize the share of discussion across media types, country, gender, and sentiment. You'll be able to speedily work out where your campaign is impacting, and what kind of impact it's making.



Top tip: using the same graphs makes comparison of results, a walk in the park.

### Analyzing the reaction

#### Qualitative vs quantitative

The emotion cloud and pie graphic shown below, reveal which elements of your campaign people responded to, and exactly how they discussed it online.

Qualitative analytics vs quantitative analytics.



Top tip: look at reactions qualitatively (left) and quantitatively (right) to understand reactions to your campaign from multiple angles. Emotion clouds show immediately, the kind of conversations that are taking place.

## Influencer impact

### Look who's talking

When influential people talk about your campaign, it can have a major impact on reach and people's decision to buy. It's vital that you know who's talking, whose comments are making an impact, and what they're saying.

Influencers	Number of Posts	Reach	Engagement
John Cena @JohnCena	1	10.1M	878271
adrian @Tolerance	1	12522	241888
DAVID DOBRIK @DavidDobrik	1	1.23M	221124
Gabby @c_gabby14	2	829	305178
Ryan O'Neill @ryan10mufc	1	1251	134802

RESULTS
<b>John Cena</b> @JohnCena tweeted Sooo #iPhoneX about #FaceID...ummmmm... what do I do? published on 12/09/17 at 16:55   United States   twitter.com
<b>brendon skolat</b> @brendonSkolac shared an image Beyoncé: "uses iPhone X facial recognition" (iPhone X pic.twitter.com/8ao9moveCd published on 12/09/17 at 16:19   Twitter   France   twitter.com
<b>Worldstar Hip Hop (worldstar)</b> shared an image #Facts! 📱📱📱 #iPhoneX #WSHH published on 12/09/17 at 21:45   Instagram   United States   instagram.com
<b>Scampi</b> @imScampi tweeted iPhone iPhone 3G iPhone 3GS iPhone 4 iPhone 4S iPhone 5 iPhone 5S iPhone 6 iPhone 6S iPhone 7 iPhone 8 iPhone X iPhone XO TOUR LIFE Lili Uzi published on 12/09/17 at 14:21   Twitter   United States   twitter.com

Top tip: sort results by engagement for the best results. The number of posts can be easily manipulated by spammers. Reach metrics give you the size of somebody's following but not always the impact their posts are having.

## Global view

### Impact round the world

Obviously, your campaign will be received differently, according to region. World maps give you the overall picture, plus the elements of your campaign that were discussed.



Top tip: use multiple global, national, and/or regional views to visualize the impact of your campaign on a broad, and more granular level.

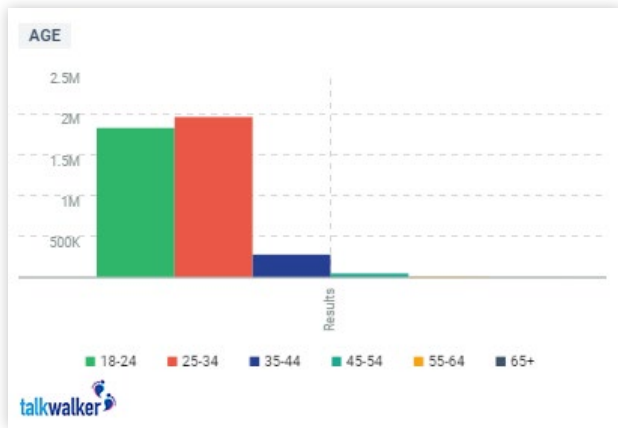
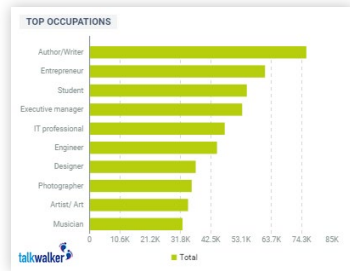
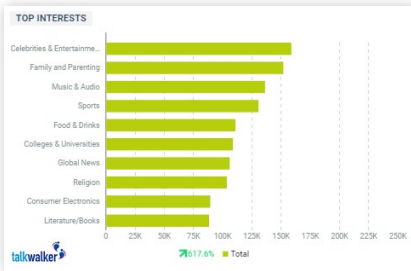
## Digging deeper into demographics

### Data for planning future campaigns

For most campaigns, you know who you're targeting. If you drill down into the age, interests, and occupations of the people talking about your campaign, you'll understand:

1. If you reached your target.
2. Who else outside your main target is interested.

This gives you the data you need to plan future winning marketing campaigns.



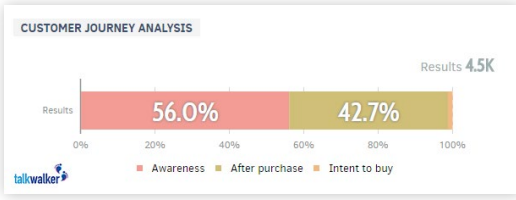
Top tip: Horizontal bar charts are a great way to compare the volumes of multiple topics from most to least. The cascade effect is cool!

## CAMPAIGN MANAGEMENT FORMULA

### Campaign impact

#### Actions & reactions

These graphs explain what actions people are likely to take based on your campaign. They also reveal consumer's initial reaction to using your product or service.

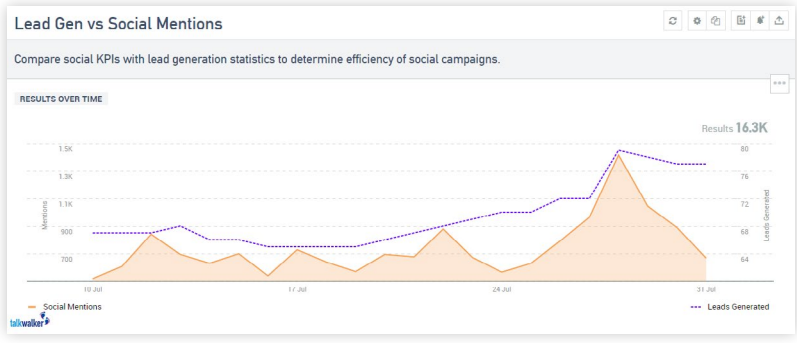


Top tip: Compare share of discussion using stacked graphs, bar or column charts - they work better when you have fewer topics to compare.

### Business impact

#### Demonstrating ROI

Your online and social media marketing campaigns have to show ROI. That's a given. This could be in the form of sales, a predetermined goal conversion, or even an increase in share price. You then have to prove how your activities led to this outcome.



Top tip: Placing marketing metrics and sales or business KPIs on one graph help identify the impact of your campaign. Using the right graph - live vs area - helps differentiate between the two metrics.

# Points to keep in mind

1. Ensure your reporting has a clear flow. In the examples, I've gone from the immediate impact, to details, ending with the bottom line.
2. Add annotations and explanations to your graphs, for yourself and your audience. This makes them easier to understand.
3. Don't overload with data and keep to the key points.
4. Experiment with different methods of visualizing data. I've given suggestions, but I'd suggest you test. Find out what works best for you and your audience.

*Next up... learn how to run a successful campaign - how to identify what you want to achieve, measure ROI, and get the results you're looking for.*

# Managing your social media campaign using social listening

*Social media marketing is a tough nut to crack, regardless of industry. Competition is fierce. There are so many different channels - each with its own distinct voice, demographic, and way of working.*

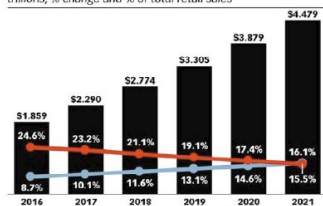
*One size does not fit all.*

Creating a show stopping social media campaign takes time and effort. If it's a one-off event, the way you handle it may differ from your usual social media marketing methods.

Regardless of industry, managing a successful campaign starts with identifying what you want to achieve - your goals. Be it earning more followers, getting more traffic to your website, or increasing newsletter subscriptions. Your goals will depend on your business, on your marketing objectives - more sales, increasing brand awareness, reducing churn. This guide looks at eCommerce sites - although the advice shared, the tips and tricks, and the analysis, apply to any industry.

## Using social media analytics to drive more revenue

**Retail Ecommerce Sales Worldwide, 2016-2021**  
trillions, % change and % of total retail sales



■ Retail ecommerce sales ■ % change ■ % of total retail sales  
Note: includes products or services ordered using the internet via any device, regardless of the method of payment or fulfillment; excludes travel and event tickets  
Source: eMarketer, June 2017

227686

www.emarketer.com

When we think of eCommerce brands, we think of the big boys - Amazon, eBay, Etsy, ASOS, Walmart, Alibaba. With the average person spending nearly two hours per day on social media, the fight for visibility is constant, and can be overwhelming.

Feels like you're banging your head against a brick wall, right?

In the US, the number of Internet shoppers is set to reach 217 million. eMarketer estimates that the [global eCommerce market will increase](#) from \$2 trillion in 2017, to almost \$4.5 trillion by the end of 2021. That equates to 16.1% of total retail sales. *Wowzer!*



## MANAGING YOUR SOCIAL MEDIA CAMPAIGN USING SOCIAL LISTENING

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Social media channels are packed with content from online retailers selling their goods. Conversations ignite between consumers and brands, which contain a whole heap of insights and data.

I dug deep into 10M+ results for the period of one year. Topics included Amazon's Twitter marketing strategy, and the most popular smartphones on social. If you check out this guide, you'll learn how to:

- **Boost campaign efficiency** - using social data to understand seasonal trends and identify the most popular products on social
- **Improve social marketing results** - track key social metrics and uncover all the secrets of competitor success
- **Determine ROI** - integrate social data with revenue to reveal which platforms deliver the best results

### Table of Contents

#### Plan

Get your timing right

Choose the best products to feature

#### Monitor

Test and monitor new strategies on social

Target campaigns by device

#### Measure

Track social campaign ROI - beyond Google Analytics

#### Conclusion

## Part 1

# Plan

### Get your timing right

Okay, you're about to start creating your campaign. First thing you have to decide, particularly for an event-based campaign, is when to start.

Getting your timing right will make or break a campaign, and by looking at last year's social data, you'll be able to work out the best time to start pushing your campaigns.

### Breaking down the Christmas buzz

I sampled data for social media mentions of Christmas over a year to try and find the patterns of social buzz for one of the biggest and sparkliest holidays for retailers, both off and online.

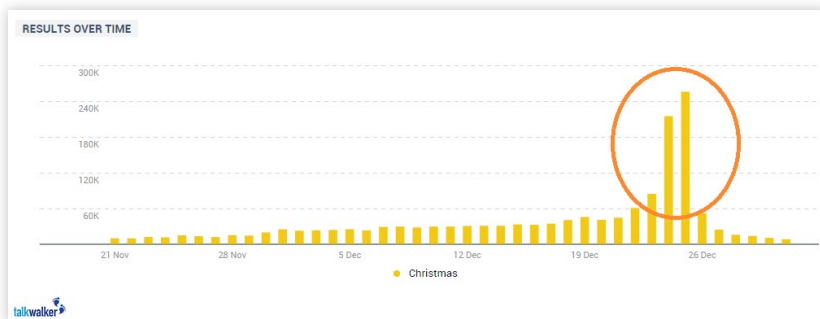
The data shown is a 1% sample of the total number of online mentions, giving an idea of the scale of activity surrounding Christmas on social media. In December alone, Christmas generated almost 1.5 billion social mentions - that's close to 4.5 million mentions per day.

*Lordy, that's a lot of sparkly mentions!*

Looking at the lead up to Christmas and the following period, the graph shows that there is a steady increase in buzz from the end of November onwards, followed by a spike on December 24 - 25. These two days earned over 50 million unique mentions of Christmas on Twitter.

*Jingle those bells.*

## MANAGING YOUR SOCIAL MEDIA CAMPAIGN USING SOCIAL LISTENING



Christmas buzz on social shows a steady increase right up until Santa's arrival on December 24/25.

However, for eCommerce specialists, the trends leading up to Christmas may be of more use, take a look.



The Christmas buzz increases significantly following Thanksgiving and at the end of the last working week before the big day.

If you look closely at the graph, you'll see that the first spike hits at the end of Thanksgiving weekend in the US, Nov 29 - 30.

The next spike is the following Sunday, and continues with a steady increase. The final push before Christmas week hits on the last Thursday and Friday - the last working week before Christmas for most of Europe and North America.

## MANAGING YOUR SOCIAL MEDIA CAMPAIGN USING SOCIAL LISTENING

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What are we seeing in terms of campaign timing?

- Monday after Thanksgiving weekend - brands should set their sights on Christmas
- As the festive season kicks off, Sunday is a great time to push Christmas related social activity
- Social buzz reaches fever pitch the Thursday and Friday before heading into Christmas week and onwards - this is where focus should be

Using insights found from social media data around key seasonal holidays, online retailers can fine-tune the timing of their social marketing campaigns and make adjustments in real-time to ensure they are capitalizing on holiday buzz.

### Choose the best products to feature

Understanding which products are driving the most chat on social media will give online and offline retailers a clear indication of the products and promotions to feature during their holiday campaigns.

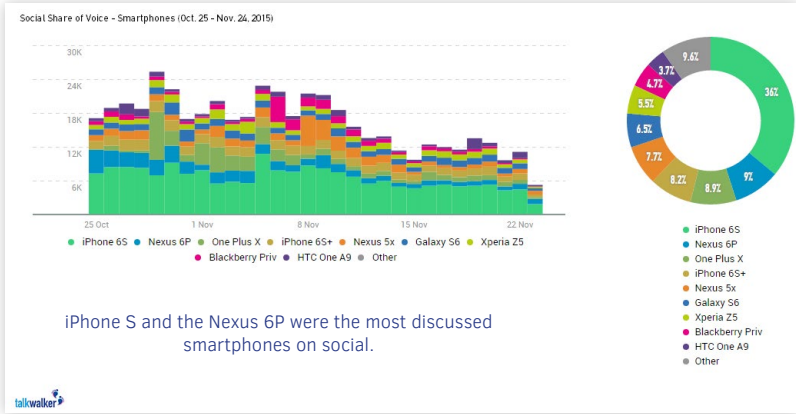
One of the biggest drivers of revenue for eCommerce sites is **electronics**, with almost 30% of all sales of electronics, appliances, and computers coming from digital channels. In recent years, the fiercest competition in the electronics sector has been in the smartphone industry.

Using Talkwalker **social media analytics**, I looked at some of the top smartphones currently on the market. I wanted to see which were generating the most buzz over a one month period.

## MANAGING YOUR SOCIAL MEDIA CAMPAIGN USING SOCIAL LISTENING

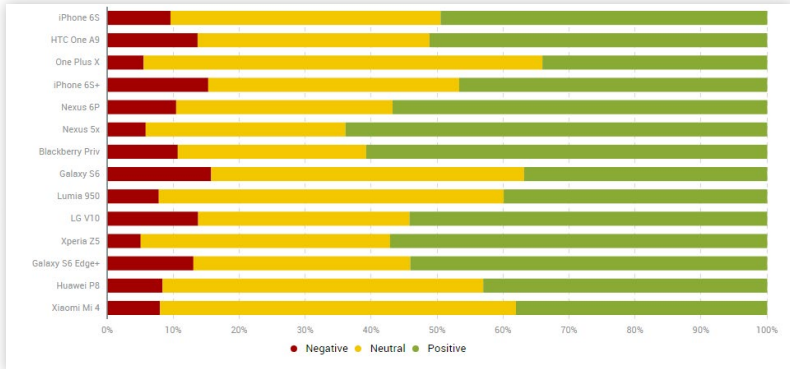
### iPhone 6S leads across all media channels

Data reveals that in the busy November to December period, which includes the lead up to [Black Friday](#), Cyber Monday, and Christmas, mentions of the iPhone 6S lead the pack with over 35% of the overall conversation.



No big surprise, given the brand strength of Apple and the iPhone. But take a look further down the list and the fight for share of voice is close run - Google's Nexus 6P is the second most discussed smartphone closely followed by the One Plus X.

Mentions are one way of determining popularity on social media. Another is to look at social sentiment towards each product. How consumers feel about a brand.



On Twitter, the Nexus 5x and the BlackBerry Priv received the lion's share of positive comments.

## MANAGING YOUR SOCIAL MEDIA CAMPAIGN USING SOCIAL LISTENING

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The graph above shows the social sentiment of Twitter comments towards each smartphone examined from the end of October to the end of November. You can see that although the iPhone 6S is the most mentioned overall, in terms of sentiment, the Nexus 5x and the BlackBerry Priv lead the way.



For eCommerce sites – remember, this applies to any business – finding the right products to feature in marketing campaigns is vital for maximizing revenue. By understanding which products are being discussed the most on social, and understanding the positivity and negativity towards these products, online retailers can feature the products and brands that’ll earn the most attention and generate the most sales.

## Part 2

# Monitor

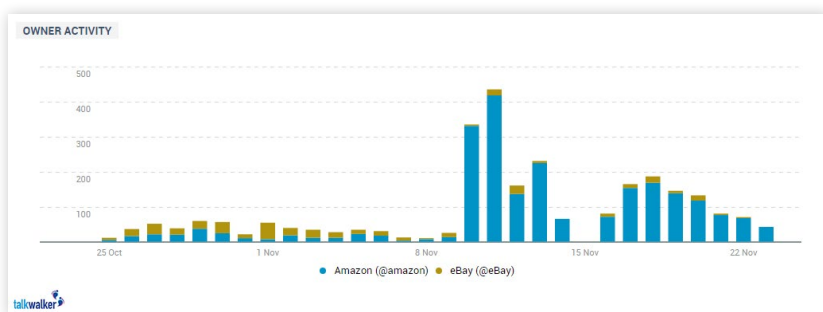
### Test and monitor new strategies on social

Your social media marketing campaign is up and running. Now, it's time to monitor your performance.

Let's look at how Amazon and eBay performed on Twitter over one month. Their social media proactivity, the activity around their social campaigns, and the devices people used to interact with their campaigns.

Back in the day, when Twitter was seen as a platform for media and news rather than commerce, Amazon and eBay both used it extensively for marketing purposes. With both holding multiple Twitter accounts and posting hundreds of tweets per day.

Take a look at Amazon and eBay's social activity on their main Twitter channel over a 30 day period and you'll see a vast gap in proactivity.

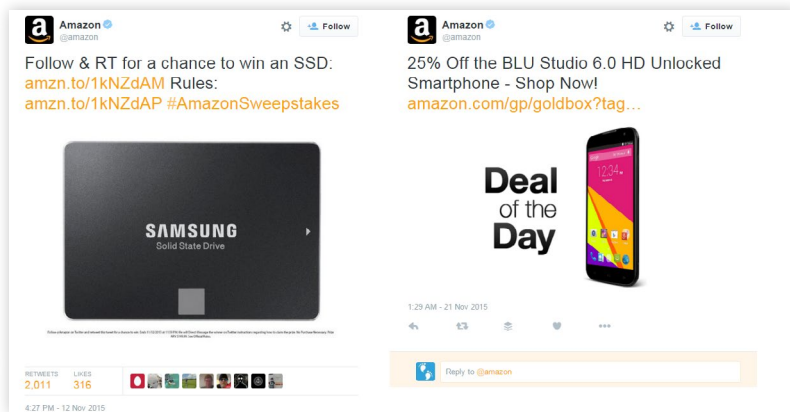


Amazon is posting way more tweets than eBay, especially from the middle of November onwards.

## MANAGING YOUR SOCIAL MEDIA CAMPAIGN USING SOCIAL LISTENING

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The difference between the brands' performance is noticeable from the middle of November onwards, as retailers head towards Black Friday and Cyber Monday. It's interesting to note that not all these tweets appear on Amazon's official Twitter feed because the brand adopted a particular strategy in their "Lightning Deals" and "#AmazonSweepstakes" campaigns.



Amazon was offering short-term deals to their audience and then deleting these deals from their Twitter feed after a period of time. This allowed Amazon to supercharge their social media marketing without blocking their Twitter feed with hundreds of tweets per day.



## MANAGING YOUR SOCIAL MEDIA CAMPAIGN USING SOCIAL LISTENING

The deals also spurred activity within their audience, with Amazon tweets generating way more engagement than eBay's. Looking at Amazon's top performing posts during this period, most of the activity was around the short-term tweets. The [virality map](#) below shows how Amazon's top performing tweet spread across the Twittersphere.



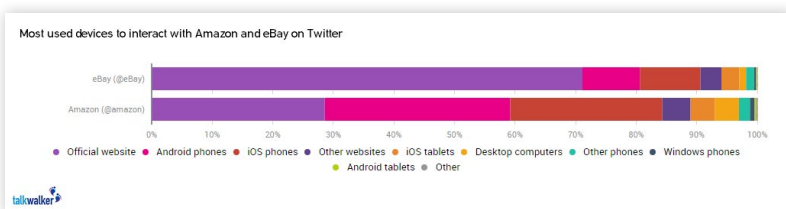
Amazon's top performing tweet was shared multiples times from several different sources.

Using social media monitoring, brands can track the performance of their own social media campaigns and monitor competitors. Identifying key strategic intelligence. eBay can gauge the huge impact Amazon's campaigns had and copy them - increasing audience activity.

## Target campaigns by device

C'mon, be honest you've got a laptop, smartphone, and tablet. You're probably planning on buying more devices.

Thanks to social media listenings, it doesn't matter how many devices one has. Marketers can track and analyze all your interactions with brands. With each device providing a different user experience, identifying the particular device can help brands focus social media campaigns. Tailor campaigns according to a particular device and/or operating system.



Over 50% of audience interactions with Amazon's Twitter feed comes via mobile.

eBay's audience uses desktops and laptops to interact (sending tweets via Twitter's official website), but for Amazon, well over 50% of audience activity is coming via mobile.

Equipped with this data, eBay could focus its social media marketing campaigns to fit its audience's preferences. Or make its social campaigns mobile friendly and increase activity. Amazon, on the other hand, could put extra effort into making sure that all their social campaigns work well on every mobile OS as there's a heap of activity from Android, iOS, and Windows mobile users.

With [advanced social media analytics](#), you can analyze your social media campaigns in real-time, with more precision. By digging deeper into the numbers behind the performance of social media campaigns, and analyzing competitor campaign strategies, brands can understand what drives campaign success on social and optimize future campaigns accordingly.

But, even with all this data the question remains. Do my social media campaigns generate revenue?

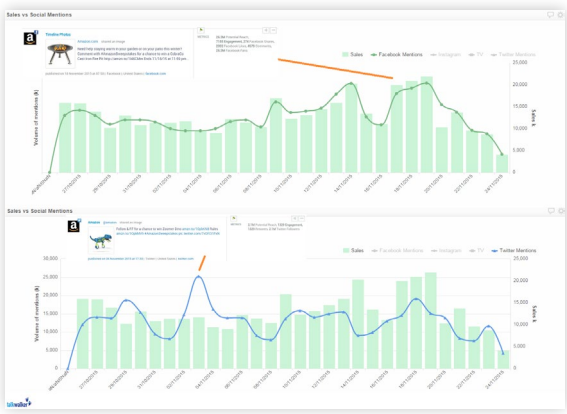
## Part 3

# Measure

### Track social campaign ROI - beyond Google Analytics

Proving the ROI of social media marketing can be a pain, but [advanced social listening](#) and data integration enables easy and accurate tracking of social.

The tracking of ROI for social media marketing efforts used to be done via Google Analytics. It meant that although direct customer paths from social to sale were tracked, the wider indirect impact social campaigns could have on driving traffic to sites, was ignored.



By plotting social mentions and revenue on the same graph, campaign ROI can be measured.

For eCommerce sites, the best method of tracking on a short term basis was to look at campaign performance. Amazon's campaigns over the previous month give us a great way to illustrate how it's done. The graphs plot Amazon's Facebook mentions and sales on one graph, and Twitter mentions/sales on the other.

These are hypothetical examples, but by plotting social data against internal figures like revenue, brands will get a clear idea of the ROI of social efforts and in this case, understand which social platforms perform best in terms of social campaign ROI.

# Conclusion

Having an edge is vital, and social media marketing plays an important role in driving sales, particularly on social networks like Facebook and Twitter.

Brands have to use social in innovative ways if they want to maximize revenue. Using social data effectively, competitors can copy/be inspired or - dare I say - overtake these big name brands, simply by taking insights found with social listening and using in their social campaign strategy.

Brands can use social data to:

- **Plan** - start campaigns at the optimum time and feature the most appropriate products by tracking seasonal keywords and trends
- **Monitor** - understand and refine campaign performance and learn new tactics through competitor tracking
- **Measure** - integrate social data with internal data to determine social campaign ROI

Brands must ensure they're exploiting every opportunity available through seriously smart use of [social media analytics](#), as social platforms optimize their sites to generate revenue.

*Keep reading to learn how to create awesome social media reports that'll wow your colleagues and your boss!*



# How to create a social media report

*You and your team spent a long time on your latest social media campaign. Preparation was intense, working till late, pizza again. Now what? Tell your organization what you've done. Show your boss what you've achieved. A social media report will highlight your goals, your results, your wins. I'm going to show you how.*

Social media channels have become an essential part of digital marketing strategies. Measuring the performance of those campaigns in a social media report can be painful. It can be confusing to figure out which numbers matter, and which don't. What you should be presenting to your team, your clients, and your boss.

To continue being effective, you need to find what's driving clicks, what's creating engagement. How that data compares to historical efforts. With that information, finding ways to improve your marketing strategy, is a walk in the park. Sign up for a free demo of the best social media reporting tool out there.

This guide will explain why doing social media reports is crucial. For your team, boss, organization, and for your future social media campaigns. Follow my seven steps to creating your reports. What you should include, metrics to track, choosing a reporting tool, and how to present. I've suggested reports, but it depends on your business goals and what you want to prove.

To show you how a social media report can look - you can [download three simulated Talkwalker reports](#).

# Introduction

*“What’s the ROI of your recent social media campaign?”*

*“Incredible... we got 1500 more Twitter followers, 45 retweets. On Facebook, it was shared 27 times...”*

Nice, but not insightful. How did it help the bottom line?

It can be hard to translate social media metrics into something understood across the board. Not everyone has your insights into the many channels you use. You need to be able to explain all that your team is doing and the results it’s achieving, to justify your budget. A visual, comprehensive social media report will explain all.

The secret of successful social media reporting lies in comparison. Compare how your channels performed before vs how they perform now. And, how your social marketing campaigns are positioned against your competitors.

## Table of contents

**Why do I need to do a social media report?**

**7 steps to creating social media reports**

**Social media reports**

**Choosing a social media reporting tool**

**Download social media report template**

**Takeaway**

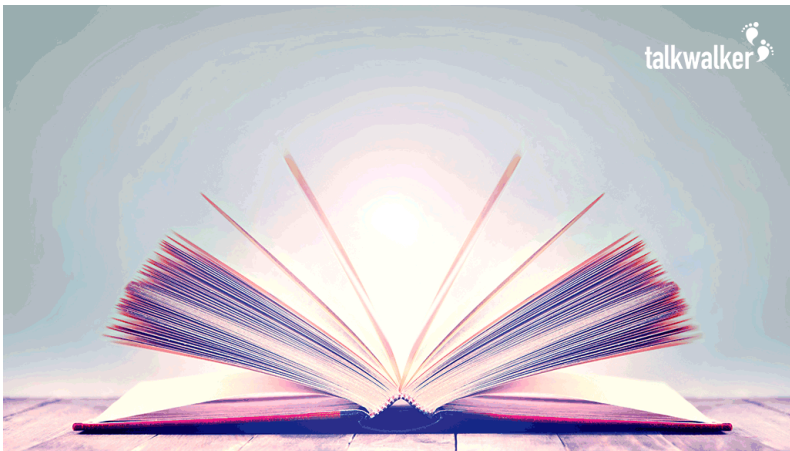
## Why do I need to do a social media report?

*Don't ever, ever assume that senior management understands social media, or what your job involves. It's up to you to educate them. To prove your team's value. To prove your value.*

You'll need to explain what you're doing and why you're doing it. Your targets and the results you've achieved. You'll have to justify your budget.

- Measure the ROI of social media campaigns so you can prove their value and targets met
- Show your clients how their social accounts are evolving
- Identify successes and failures, so you can tweak to improve, repeat, or delete
- Save time with automated social media reports - using videos, images, and comments to make them easier to understand and remember

Tracking your social media strategies and owned accounts will help you find what's working and what isn't. You can share your strategy across your organization and help prove that your team's efforts are effective. Targets are being achieved.

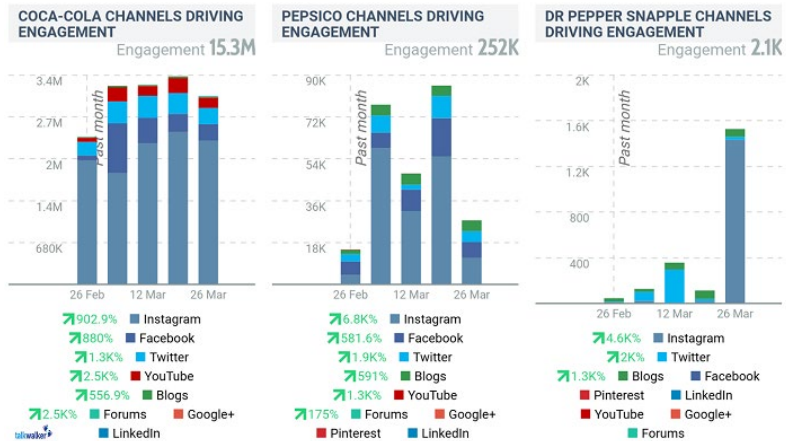


[Glossary of social media terms](#) - you never know when it might come in useful.

## HOW TO CREATE A SOCIAL MEDIA REPORT

Comparing your social media channels will identify which channels are favored by your audience. Which are bringing the most success, with minimal effort. Identifying what content is working and bringing high engagement means you can replicate your successes, and improve any failures. Check out your competitors, and you'll be able to compare market impact and see whether you're missing out on opportunities to expand your online community. Seeing the bigger picture allows you to demonstrate that your business decisions are effective. Decisions like, prioritizing resources based on the channel bringing the highest ROI.

### - Market Impact -



Market impact demonstrating strategy across networks, compared with competing brands (simulated report).



## 7 steps to creating social media reports

*It's all in the preparation - who, what, why, how...*

### #1 Identify stakeholders

- Stakeholders receiving your reports - senior management, sales & marketing team leaders, customer support, demand gen
- Recipients of social media metrics in your organization

Different teams have different requirements - community management, sales, PR, etc. Senior management won't always have the time or inclination to read a heap of pages. Keep it short and simple.

### #2 Set your goals

What are you hoping to achieve from your social media reports? What are you trying to prove, to justify? Social media reporting can be broken down into three categories:

- Regular reports - using key metrics to demonstrate progress on social media. Your brand alone, or you can include competitors and industry
- One-off report - following a campaign, event, product launch. Metrics and qualitative analysis to gauge success
- Research reports - using [social listening to find insights](#) around a particular topic or trend.

### #3 SMART questions

#### Specific Measurable Achievable Relevant Timed

Regardless of which report you're writing, first thing you should do is identify the questions you want to answer.

A report following a specific marketing campaign might ask - did the campaign drive conversation among your target group?

A research report might ask - what do men want in their 40s from a clothing brand?

### #4 Which metrics to track

Just because you can report on something, doesn't mean you should.

The more you include, the greater your reporting task will be. What you choose to measure will depend on your needs and which social networks you use - Twitter, Facebook, Instagram, LinkedIn, etc. Try to avoid custom metrics that'll need you to calculate every time, unless vital.

Measure metrics that you'll learn from, and that will inform your decision-making:

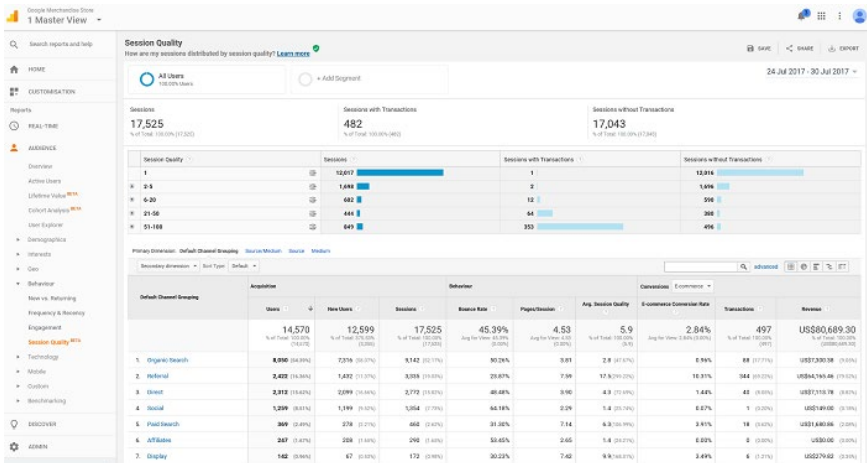
- **Leads** - visitors that have the potential to become customers. Leads coming from social can be directly tied to revenue. Target consumers with gated content, contests, events, demo sign-ups, newsletter subscriptions, etc., to increase registrations. Regular content that resonates with consumers will drive sign-ups.
- **Trackable links (UTM code)** - to track the leads you're generating, and those that convert
- **Conversions** - when a lead becomes a paying customer, acting on a call to action - opening an email, registering for a download, subscribing to a newsletter, scans a QR code, etc.  
*Jay Baer, "we're after action, not eyeballs." Paying customers - that's what it's all about.*
- **Reach & impressions** - the number of people that see your posts. It's a metric that demonstrates the value of your content beyond the total number of likes.  
**Reach** = total number of people who see your content  
**Impressions** = number of times your content is displayed, clicked or not
- **Volume** - track conversion size and number of brand mentions
- **Engagement** - this is about the relevancy of your content. Analyze the quantity and type of engagement your social media channels and content receives. Include clicks, comments, and shares. Recognize which channels are performing well for your brand. Highlight posts doing better than normal. Identify pain points, so you can action for improvement.

## HOW TO CREATE A SOCIAL MEDIA REPORT

- **Audience** - identify who participates in conversation, most active users, influencers. Demographics - show your clients that you're attracting the right followers. Present a breakdown of audience - location, gender, language, interests, occupation, age.
- **Content** - track your top performing posts, and those that have tanked. Include the number of posts published monthly, to prove the activity of your team.
- **Click-thru with bounce rate** - track bounce rate of website visitors coming from social, and compare to website visitors who visited your site directly, arrived from search engine, or came via any paid ad campaign. If your social media bounce rate is lower than those other sources, you can show your boss that you're targeting the right people on social, and the traffic you're bringing is more valuable to the business.

**Bounce rate** = % of page visitors who leave your site after only viewing one page. In social media it would be someone clicking on a link in TW/FB, landing on your site/blog post, leaving without looking at any other content.

**Tool** = Google Analytics - acquisition tab - all traffic - channels - bounce rate.



Google Analytics - turning insights into action.

## HOW TO CREATE A SOCIAL MEDIA REPORT

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- **Share of voice (SOV)** - competitor analysis. Mentions show how much consumers are talking about you on social. Find out how your SOV compares with that of your competitors.
- **Lessons learned** - share social media insights you've learned with other teams in your organization. For instance: product feedback, technical issues, praise.
- **Executive summary** - include a summary of your top achievements during the month. Keep it short - up to 5 bullet points.

You're going to be tracking a heap of data. When it comes to reporting results, you need to be shrewd about what you share. Not because you're hiding things. But because not everything you're monitoring is going to be relevant to your boss.

Be consistent - report the same metrics in the same way, each time. Include percentage changes and benchmarks to make it easier for your audience to understand the results.

### #5 Choosing the best social media reporting tools

Clarify your priorities and goals before you start looking for the best tool.

Ask questions:

- Where does the tool source its social data?
- What's the quality of data?
- What relationship does it have with the social networks?
- Does it include insights from the networks that you're looking to report on?
- What type of customer support or account management does it provide?
- What features are on its roadmap?

Social media channels are evolving. You need a tool that will keep up with these changes.

There are good free tools out there, but they won't provide you with all the statistics you need. A single tool would be best, rather than multiple, or a different one for each channel. You'll save time and money.

## HOW TO CREATE A SOCIAL MEDIA REPORT

### #6 Choose optimal reporting timeframes

Daily, weekly, monthly, yearly, campaign related. It makes sense to report some metrics more often than others. What's your boss asking for?

If you're creating a campaign related report, you need to set benchmarks before you start. You'll then be able to track improvements.

You can do a monthly report on published content. Include the number of sessions, pageviews, new users, goal completions, bounce rate, leads, downloads. If you're targeting keywords, you could include page rankings for before and after the content was published. With this information, you'll see spikes and patterns, to better understand what's working with your audience. For example, seasonal patterns during holidays, Christmas, Black Friday, etc.

### #7 Presenting your report

Use graphs, charts, virality maps, word clouds, social posts - whatever it takes to give your reports clarity. To make them visually appealing and easier on the eye. Human brains understand images and are more likely to retain the information they're illustrating. Include a short description of what they're seeing, along with takeaways and analysis highlights.



Use a mix of visuals to support and explain your results.

## HOW TO CREATE A SOCIAL MEDIA REPORT

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Remember context - your boss might panic if shown a handful of negative tweets, not realizing that they're only 2% of an ongoing conversation.

### *Don't terrify the boss!*

You should be ready to:

- **Understand what happened so you can plan the future** - pull out last year's data to target this year's critical KPIs
- **Get to the point** - anything that doesn't impact your goals, don't waste your time, don't waste your boss' time
- **Understand the data you're presenting** - don't list numbers, tell a story
- **Be brutally honest** - learn from your successes and failures. Never lie about or fluff over what the results represent. Ensure your team is ready to address negative results immediately
- **Make it actionable** - allow the data to steer your decisions and plan how you're going to respond, according to the results

The goal of your social media report is to optimize your social media activities and benefit your bottom line.

## HOW TO CREATE A SOCIAL MEDIA REPORT

Questions to ask:

- What're my followers up to - sudden increase/decrease?
- Wow, hundreds of new followers. Genuine/fake/low quality? Have I tagged anyone (Bieber) or used a hashtag that's attracting bots?
- How are engagement levels looking for my content - big increase/decrease?
- Are there new influencers I can reach out to?
- What's the performance of the hashtags I'm using - increase in activity of those I'm following?
- What's my brand sentiment - positive/negative increase?
- How are my competitors performing - increase in followers, sentiment, etc.?

Using [Quick Search](#) - Talkwalker's social search engine - I've looked at three months of sentiment directed at Diet Coke.



Negative sentiment dominates and the brand should dig deeper to find the cause.

Going deeper into Quick Search, I can find the cause of the biggest slump, plus the surrounding negativity.



Scott Dworkin has 321K followers.

## HOW TO CREATE A SOCIAL MEDIA REPORT

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Unfortunately, the brand - while not being personally attacked - got caught up in posts poking fun at the US President. This is information that should be reported. To explain the severe bout of negative sentiment, and to find a way of turning it into a positive.

*If you're interested in the rest of these potentially brand damaging tweets, or you'd like to track the sentiment of your brand, check out [The practical guide to sentiment analysis](#).*

### **Punctual campaign report**

Marketing campaigns - when successful - have a significant impact on company growth. Are you measuring this impact? It's time you proved the value of your team and your campaigns.

A punctual campaign - time-bound initiative - has a single/targeted message and is intended to drive a particular conversion/reach specific business goals. You'll want to report on the ROI of each punctual campaign. Track audience engagement, identify and analyze the opportunities that resulted from your campaign. Depending on the structure of your campaign, the following are metrics you should measure.

### **Metrics to share with your organization or client:**

- What impact did the campaign have?
- Were preset goals met?
- How much traffic did the campaign drive?
- How many leads did the campaign bring?
- What was the engagement rate of customers?
- How much revenue did the campaign influence?
- How does this campaign compare to previous?



## HOW TO CREATE A SOCIAL MEDIA REPORT

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You'll need to track paid ads - performance and frequency, keeping the budget on track. Optimizing goals and allocating money depending on what's working and what isn't.

- **Facebook ads** - frequency, reach, clicks, impressions
- **Twitter ads** - click-thru rate, reach, unique clicks, cost per retweet, cost per follower, budget
- **LinkedIn ads** - clicks, likes, impressions, engagement, followers

### Metrics to improve future campaigns:

- Which landing pages had the highest conversion rates?
- Which blog posts took off?
- Which emails were opened most?
- Which social messages drove the most engagement?

### Monthly report

Used by management for performance comparison over periods of time. Watch for spikes and slumps. Is that spike a trend or a one-off incident? Ensure you determine this before tweaking your social media plan on an exception, rather than the norm.

*Example: You included @justinbieber in a tweet and it all went a bit crazy on Twitter.*

You should include the following:

- This month vs last month
- This month vs the same month, last year
- KPI movement - include acquisition, conversions, engagement, retention KPIs

This is going to the boss, so be ready with the answers to all the questions you'll be asked. More data, more questions...

## HOW TO CREATE A SOCIAL MEDIA REPORT

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Tips:

- Focus on crucial metrics - 3-5 max
- Avoid including data you can't explain. What caused that spike? No clue!
- Use visualization to clearly show trends and progress
- Tie the results back to business goals

*Example: goal = customer retention. Show increase in sessions coming via social media for returning customers*

### Quarterly strategy review

Your quarterly strategy review will help you maximize the performance of your marketing team. The goal is to assess how fit for purpose your strategy is, while learning from the previous quarter. This in turn, will influence planning for the next quarter.

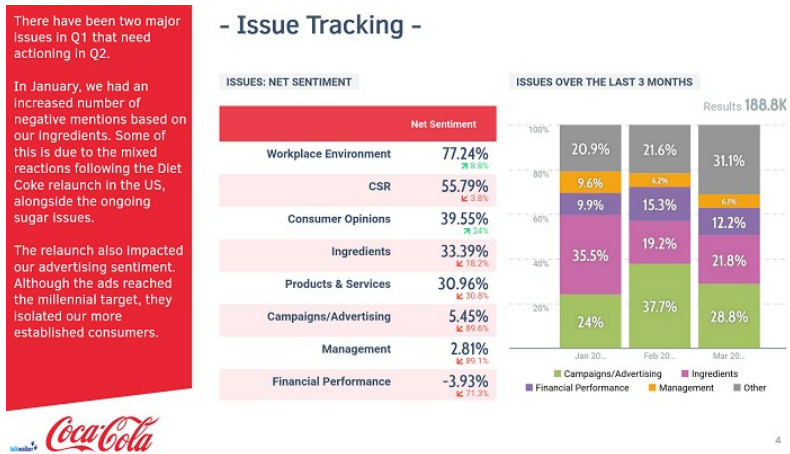
Your quarterly review should cover:

- Current strategy, focus and goals - what your social media campaigns will achieve, in line with business goals
- Progress against goals - where is your team with regard to targets - ahead/behind targets?
- Hits and misses - what worked, what didn't, why? Your review should cover reasons for successes and failures
- Issues and resolution - what stopped goals being met? What improvements will be made? Who will be tasked with this? How will you monitor and report the results?
- Insights - what did you and your team learn that will help improve your social media marketing?
- What data will you share across your organization that will improve performance?
- Example: customer feedback and insights with customer service team, sales
- Next steps and actions - plan of action with roles defined, responsibilities, target deadlines

## BRAND PROTECTION REPORTING

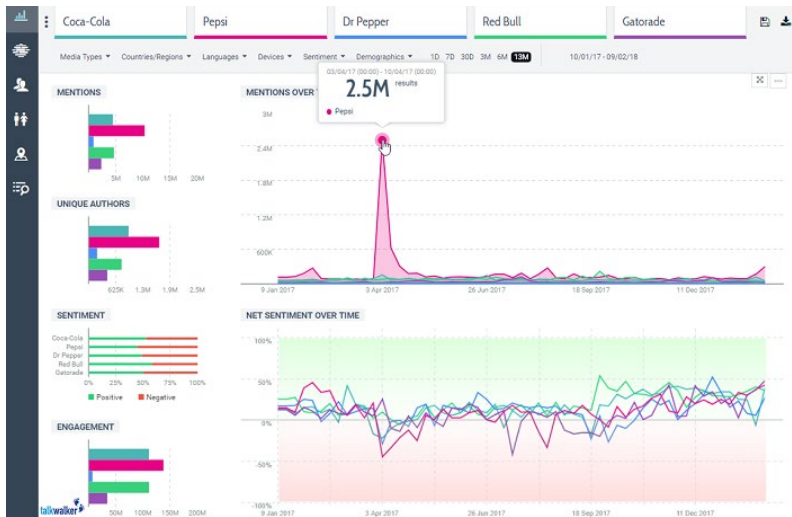
### Crisis management

When a brand gets embroiled in a potential crisis, a fast assessment and reaction is crucial. Reporting on your online performance is only valuable if you're honest, and face up to the truth. Consider establishing a [brand protection strategy](#). It will significantly reduce the chances of a crisis occurring.



### Share of voice report

Who are people talking about most, you or your competitors? What's your brand's share of voice (SOV) in your industry? Having a spike in SOV isn't always a good thing, if the increase was caused by a crisis situation. Below, Quick Search compares Coca-Cola, Pepsi, Dr Pepper, Red Bull, and Gatorade over a 13 month period.



Coca-Cola is the undisputed king of fizzy drinks, but the roar of Pepsi drowned out Coke in April with 2.4M mentions. What happened to cause this increase in SOV? In your social media report you need to include the stats, the graphic, and the cause.

Check out [How to conduct a competitor analysis](#), if you want to find out the cause of what turned out to be a reputation bruising crisis.



## BRAND PERFORMANCE REPORTING

### Social network comparison



Which channels work best for your brand and are popular with the consumers you're targeting?

Compare results from all your social channels. Each channel is different, and might not be a fit for your brand. Try out some alternative strategies. If it doesn't improve, concentrate on the channels that work for you.

### Brand health report

How effective is your brand in achieving your business goals? Tracking reputation, awareness, engagement, and positioning will give you an overview of your strengths and weaknesses.

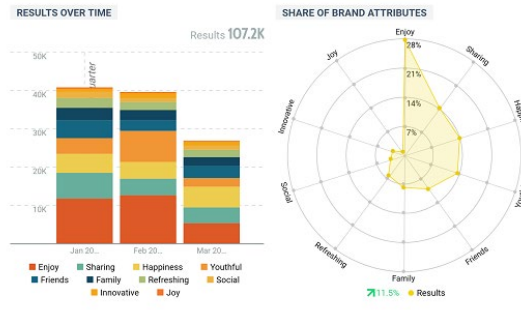
Our marketing efforts for Diet Coke in February have shown an increase of youthfulness in our brand attributes.

However, they were short lived, and in March we've taken a hit in audience engagement.

Most of this is due to the drop in 'enjoy' attributes. Did we lose the 'enjoy' focus as we targeted a different market?



### - Brand Health -



Report the stats, and Brand health (simulated report). ask questions. An increase in share of voice sounds great, but is it due to a potential crisis? Gathering all your results and analysis into a single report will give you the complete picture of your brand health.

## BRAND PROMOTION REPORTING

### Brand reputation

Reputation measurement is considered tricky to measure. It's about what consumers think of your company, brand, values, trustworthiness. Measuring sentiment - opinion mining - tracks and analyzes mentions of your brand. Assigning a positive, negative, and neutral score. In simple terms:

$$\% \text{ of positive score} - \% \text{ of negative sentiment} = \text{reputation score}$$



Track and report changes in sentiment after you've implemented a social media campaign.

McDonald's has 62% negative sentiment compared with 40.5% for Burger King. Check out the [Practical guide to sentiment analysis](#), if you'd like to find out the cause of the negative sentiment score.

### Influencer metrics report

#### - Influencers -

## Plastic particles found in bottled water



David Shukman  
Science editor

15 March 2018



An influencer with a healthy following, that could be beneficial to business.

## HOW TO CREATE A SOCIAL MEDIA REPORT

In your report, to illustrate how this influencer's article spread - his influence - include a virality map.



Show how the article from the BBC, spread around traditional and new media.

How many people are your influencers reaching? How much engagement do they drive? The audience you're targeting, are they interacting with your influencers?

## - Influencers -

### TOP SOCIAL INFLUENCERS BY ENGAGEMENT

Influencers		Posts	Reach	Engagement
	jazmin garibay, merca20.com	4 ↑ 300%	3M ↑ 198.7%	520.1K ↑ 1.5M%
	oswaldo olivas, merca20.com	5 ↑ 150%	3.7M ↑ 86.7%	346.8K ↑ 7.8%
	National Geographic, facebook.com	f 1	45.3M	3.5K
	Barcelona is my life 🇪🇸, instagram.com	📷 1	17.6K	3.4K
	100 Montaditos, facebook.com	f 2	735.3K	3.2K



Influencer reach and engagement (simulated report).

## Choosing a social media reporting tool

*Now you understand why accurate reporting is so important.*

Feeling overwhelmed at the work involved? How are you going to create an awesome social media report? How will you find time in your crazy work schedule?

There's a heap of cool social media reporting tools on the market, all you need is the questions to ask.

Don't be bamboozled by a suave sales rep talking AT you. Check out my cheat sheet, and tell them WHAT YOU WANT.

### **Can I choose the format of my social media report?**

*Your boss likes to present a PPT presentation to the board. Your team's happy with a Word doc. Look for a tool that gives you multi-format reporting choices – PowerPoint, HTML, Word, PDF.*

### **Can I use pictures in my reports – my boss isn't big on words?!**

*Social media is all about visuals. A good social media reporting tool has to reflect this. Not just to make it pretty, but us humans understand and retain the data from charts, videos, and graphs.*

### **I'd like to see all my results in one place, is that possible?**

*360° visibility of brand health on a **content performance dashboard** allows you to quickly spot shifts in results. You can react fast and stay ahead of the competition.*

### **Can I receive notifications about changes in my results?**

*You can set up alerts to keep you up to date about key metrics, new results, and unusual activity that may require immediate action.*

### **Am I able to badge my social media dashboard with my own company logo?**

*White labeling allows you to customize dashboards and social media reports with your corporate branding.*

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## HOW TO CREATE A SOCIAL MEDIA REPORT

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### Is it possible to combine third-party data sources with my internal data?

*Importing external data and adding to your in-house data will reveal correlations that could affect your marketing campaigns. For instance, a retail outlet could include weather data to understand what flies off the shelves before a storm hits. Finding an increase in the sale of waterproof clothing, bottled water, torches, candles, dried goods, means the outlet can increase stock, and increase revenue.*

### I've way too much data to be able to find what I'm looking for. Can I use filters?

*If your social reporting tool has rule-based tagging, you'll be able to add filters to past and future data. These rules can be set to flag up negative mentions, delete irrelevant mentions and spam, and assign mentions to teams around the world.*

## Download social media report template

To show you how great your social media reports can look - you can download three simulated Talkwalker reporting templates.

talkwalker

FREE DOWNLOAD

# Social media reports bundle

TALKWALKER ©



# Takeaway

- 1. Define business goals** - increase revenue, gather consumer feedback, improve customer service, increase brand awareness, create future marketing strategy.
- 2. Define KPIs** - without, you can't measure the success/failure of your marketing strategy.
- 3. Social media channels** - one size doesn't fit all. Peak engagement times on Twitter, may be different to those on Facebook.
- 4. Listen to your audience** to ensure your content is targeting the correct demographic and that it's engaging with it.
- 5. Analyze top-performing posts** - consider format, language, image, voice, timing, response rate.
- 6. Brand advocates** - monitor your tweets for mentions by industry influencers.
- 7. Results** - show what's working and what isn't. Present to your team, organization, boss – to prove and improve future social media marketing campaigns.

# Locked & Loaded!

*Do you still hear that insistent buzzing?*

*Good.*

*If you don't, you should panic. It means that no one is talking about you - and that's never a good thing. This eBook walks you through planning, executing, measuring, and analyzing a digital marketing campaign.*

*You've reported on last year, brainstormed with your team, checked out your competition, found customer insights, performed SWOT analysis, identified your SMART goals, and set your KPIs.*

- *You're **ready** to create a killer digital marketing campaign*
- *Your **aim** is to measure and analyze the results of your campaign*
- *And your bosses questions? You're on **fire!***

**You learned to listen.**

# Impact starts here.



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