

UNTANGLING THE SOCIAL WEB: A HOW-TO GUIDE

PART 6: HOW TO DEVELOP AN EXTERNAL SOCIAL WEB STRATEGY

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INTRODUCTION

With incredible speed and scope, social networking has altered the way people communicate, share and even maintain relationships worldwide. For businesses, the impact of this sweeping change is enormous, bringing both new challenges and opportunities when it comes to communicating with shoppers, associates and trading partners.

The rapid pace of this growth, however, has left many businesses struggling to find a path forward, searching for guidance on how best to use the social web. This is because the rules of engagement and exact measures of success in the entire social web remain undefined and undetermined because it is continually evolving.

The retail business leaders that make up the Coca-Cola® Retailing Research Council (CCRRC) of North America acknowledged these problems in selecting social media as its research topic for 2012. The council felt that they, like many business leaders, needed greater understanding of the social web and guidance on how to move forward. The first five parts of this study examined why the social web is growing so quickly, why it is alluring, how to understand its usage and an outline of the challenges businesses face.

Part 6 hopes to provide businesses a clear, easy-to-follow path toward success in the social web. By following the steps listed in this report, you will gain a sense of:

- *How to build a social networking strategy*
- *How to choose between the many social networks*
- *How to develop your social web voice and engage effectively*
- *How to build measures of success and achievement*

Following these steps, along with the exercises and examples included, can help a business of any size get a clear picture of how to move forward successfully in the social web.

We also recommend that you consult with Part 7, a how-to guide for developing an internal social web strategy to understand the full potential of the social web for all aspects of your business, including employee relations and recruiting.

Untangling the Social Web: Understanding the Basics

Being social is nothing new. Humans are programmed to socialize, connect and share.¹ And over the years, businesses have found success in being part of their shoppers' social lives. But socializing in today's world has increasingly become a series of digital interactions—endless streams of Tweets, Facebook posts, comments and check-ins. It's no longer enough for businesses to connect with shoppers through traditional means like TV, print or in-store messaging. Shoppers use the social web to plan shopping trips, get and give product advice and examine business reviews (good and bad). And it's likely that conversations are happening about your business on the social web whether you know it or not. In today's world, it's necessary for all businesses to join the conversation and be part of the social web.²

The social web is a complex and evolving space, but it has tremendous potential for retail businesses of all kinds. Feedback from a panel of social media experts interviewed for this study acknowledge the difficulties of the social web but embrace its unpredictable dynamics and use it to their advantage to create strong relationships with shoppers that aim to improve loyalty, increase brand awareness, raise sales and generate advocacy. How did they do this? By being strategic and flexible.

But how can you succeed in the social web? Think of it as a high school. As discussed in Part 1 of this series, the social web is very similar to the situations we faced in high school—people self-selecting into sub-groups, the boring people are overlooked and the fun, exciting people attract a crowd. The fear and uneasiness that we all faced on the first day of high school is the same fear that typically overwhelms businesses when they enter the social web. We hope the knowledge from Parts 1 through 5 gave you a solid foundation of knowledge and that Part 6 empowers you to approach the social web strategically.

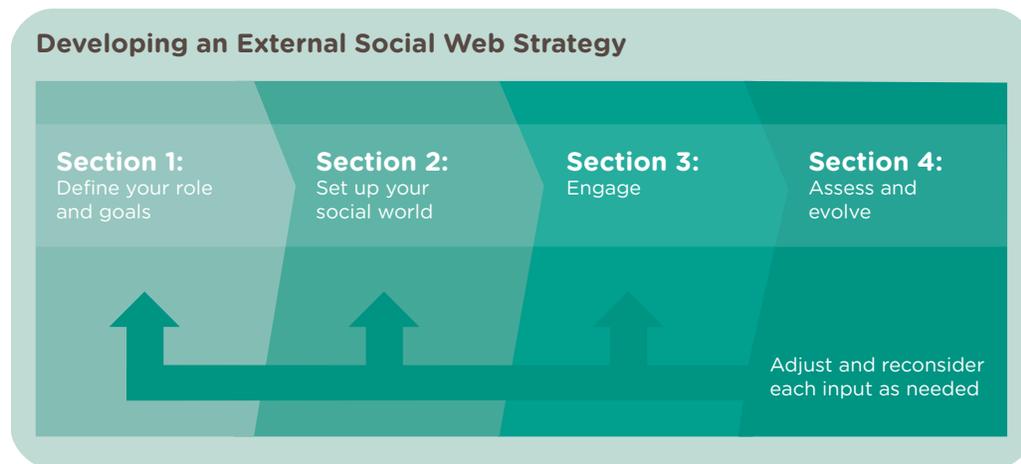
Note: Parts 1 through 5 of this study provide foundational knowledge about the social web including why it's alluring, the types of social networkers, how it is currently being used for shopping and the value for brands and retailers. These can be found for download on the CCRRC of North America website.

1 CCRRC/The Integer Group. (2012, February). Untangling the Social Web: Insights for Users, Brands and Retailers, Part 2: Identifying the Allure of Social Networking: Traits, Behaviors and Motivators.

2 The Integer Group. (2012). Expert Interviews.

About Part 6: How to Develop an External Social Web Strategy

You can tackle many business objectives using the social web—brand awareness, customer service, conversion, the list goes on. However, it is not always effective to try to conquer every business objective in every medium. An effective social web strategy starts with the ability to focus on a narrow set of objectives. This will guide your vision, operational framework, level of engagement and measurement. So how do you know which business objective(s) is/are right for your business in the social web? We feel that knowing your role in the social web helps to naturally narrow what you can and cannot do, can and cannot say and, ultimately, what business objectives and successes are achievable and relevant for your role in the space.



Section 1 will help you articulate your social role and, ultimately, your social web vision through the lens of not only your brand but also your current and prospective social connections (consisting of your friends, followers and bloggers). The section breaks down how to affirm and articulate your business' identity, observe, listen and learn about your connections to expose your social role, objective and holistic vision. This direction will help you effectively set up your social world for successful engagement.

Section 2 provides guidelines for choosing social platform(s), staffing your social operations, selecting the appropriate listening resources for monitoring activity and creating a strong social voice—elements that work together to detail a go-to web strategy for activating your social vision.

Section 3 outlines how to effectively activate on the social web. With more than 1 billion Facebook users attempting to be seen and heard in the social web, getting anyone's attention might seem like an insurmountable task—even with an airtight vision and operational foundation.³ Section 3 will demonstrate that effectively engaging in the social web relies on knowing the rules of the road but also knowing how to make them your own. It outlines four ways to engage shoppers in the

³ Facebook. (2012, October). Retrieved from: <http://newsroom.fb.com/content/default.aspx?NewsAreald=22>

social space, each of which can flex given the landscape and technology available. Engaging in this way helps you to reach your audience in new ways, be more personable, advance and develop connections. But how do you know if your engagement is working?

The social web is still relatively new and continues to evolve, which makes measurement challenging. More important, due the organic nature of the social web, it's hard to pin down exactly what success is supposed to look like. This can be frustrating for business people who love frameworks and clear measurements of success; the social web is somewhat defiant to frameworks because there are too many variables to make a simple model that applies across the board. What we do know is that after talking to our panel of social web experts, there is an overwhelming sense that the social web is an experience- and engagement-based discipline that requires a new set of metrics.

Section 4 provides insight into how to interpret activity and data points so that you can evolve and adapt. Three frameworks are proposed depending on your short- and long-term objectives. Section 4, and the guide as a whole, is meant to provide a strategic starting place as well as prompt new thinking so that you can develop an external social web strategy that suits your business—and continue to adjust and fine-tune it as needed.

METHODOLOGY

For this project, a combination of primary and secondary research was used to build a strategic framework, best practices and how-to tips for readers wanting to hone in on an external social web strategy.

We used findings from Parts 1–5 of *Untangling the Social Web* to set the stage for strategic thought. But to fully understand strategic consideration in this rapidly evolving space, we sought input from a variety of social media experts across various disciplines both in and outside the retail/grocery industry.

About the Expert Interviews

- In addition to leveraging social media, digital and media experts within The Integer Group® and the TBWA\® network, we conducted interviews with 26 industry participants including internal community/social media managers, media strategists, marketing, ecommerce and merchandising executives as well as industry consultants and external digital strategists/agencies.
- Four experts were sourced through Guidepoint Global®, an international primary research firm offering phone consultations with experts relevant to your research objectives. The remaining experts were sourced through council members.

Input from experts was then teamed with secondary research to build a holistic viewpoint. Secondary resources included subscription-based resources such as Forrester® and Experian® Simmons as well as publicly available information from social networks, industry blogs and news sites. Tracking industry blogs/news as well as brand and retailer activity on social networks provided us with real-time insights and examples of engagement and marketing in the social web.

SECTION 1: DEFINE YOUR ROLE AND GOALS CREATE A SOCIAL WEB VISION

OVERVIEW: Section 1 consists of seven steps that will shape the foundation of your strategic role and vision for the social web.

- STEP 1:** **Articulate Your Business Identity:** asks you to rethink your mission and values through the lens of the social web.
- STEP 2:** **Observe Your Social Connections:** outlines simple ways to observe current activity in the social web and build a knowledge base about your current and prospective connections.
- STEP 3:** **Deepen Your Knowledge of Social Connections With Secondary Research:** gives tips on how to expand your knowledge of social connections using secondary research.
- STEP 4:** **Listen to Expose Richer Insights:** provides guidelines for how to develop a listening plan, establish an effective methodology and select a vendor, if needed, to expose rich insights tailored to your business needs.
- STEP 5:** **Identify Your Social Role:** a vital step that asks you to examine findings from Steps 1 through 4 and identify synergies between your social connections' interests and values and your own. The resulting social role acts as the strategic foundation for your social web vision, voice and means of engagement.
- STEP 6:** **Narrow Your Sights, Identify a Social Web Objective:** provides a framework for identifying a singular objective for the social web so that it builds upon your many business objectives.
- STEP 7:** **Envision Success and How to Track It:** outlines how to elevate your social role to a holistic strategic vision that has clear business objectives and measures of success.

STEP 1 Articulate Your Business Identity

The social web is a place that thrives on authentic, personal interactions. So it is only natural that users expect to see a new dimension of their favorite brands and businesses—one that demonstrates the business' identity and passions that users can relate to. Therefore, the first step in identifying your social role and creating a social web vision is to affirm and articulate your business identity so that it is relevant to your current and prospective social connections.

Many of you already know your business' core values and mission. Use these as a starting place, but recognize that these business elements are often framed using a sales and marketing perspective for employees and stakeholders. How do your business mission and values evolve and become an identity that is relevant to your shopper and your current and prospective connections? And does your identity portray a personality that social networkers would want to engage with?

Use the following exercise to help you articulate your business identity with the social web in mind. This will also help direct strategy later in Section 2, when you are developing a brand voice, personality and persona for the social web.

Exercise 1: Articulate Your Business Identity



Attractive Attributes

Using only adjectives, list what your identity is and is not.

For example: We are helpful, playful, etc. We are not snobby, messy, etc.



The Dating Game

Write your values, mission and character as if it were a Match.com dating profile.

What are your interests, values and dislikes? What are you seeking in a mate (social network connection)? What pictures would help you attract them?



“Draw” It

Illustrate your identity using Pinterest® pinboards.

What would be your theme? Would you need several pin boards to explain who you are? What types of pictures represent you? Where would you find these pictures?



Make a Soundtrack

Create a music playlist on Spotify® that embodies your business identity.

What is your favorite music genre?
What is your favorite song? Artist?
What songs would be work music vs. play music?

STRATEGIC RECOMMENDATION: Social media experts interviewed for this study feel that your social identity should complement the overall business identity. Therefore, it is important to gather input from departments beyond marketing (including HR and recruiting, who will be doing a similar exercise in Part 7). This will help to create an identity that is able to bend and flex in various parts of the social web (LinkedIn® vs. Facebook) while still ladder up to a unified stance.

Affirming and articulating your business identity is an essential part of understanding your social role. But you must also have a strong understanding of your shopper and your (current and prospective) social connections so you know which part of your identity will resonate best with them.

Steps 2 and 3 are designed to make use of information and tools that are already at your disposal so that you can build your own personal perspectives, and, subsequently, inform and direct your listening efforts (Step 4), social role (Step 5), objectives (Step 6) and vision (Step 7) for the social web.

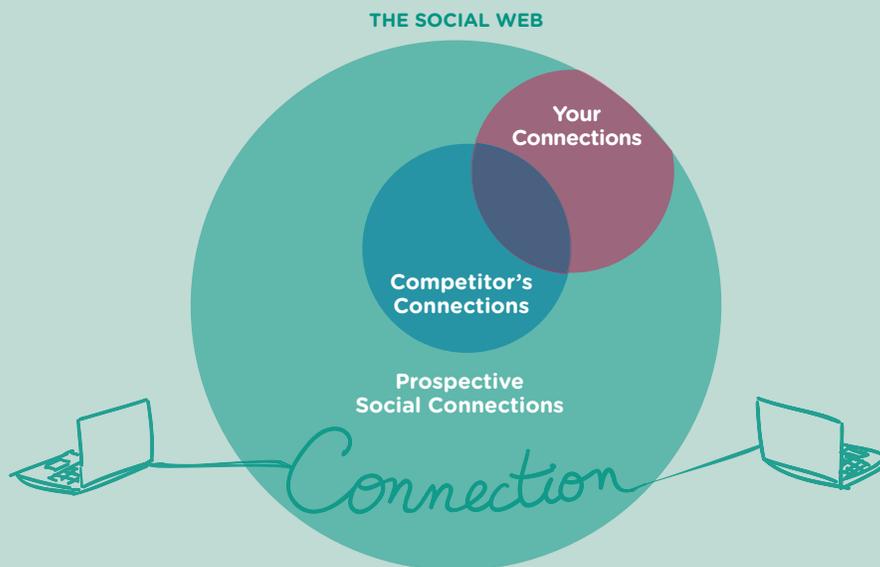
STEP 2 Observe Your Social Connections

While you might know your shoppers inside and out, the social web is a domain driven by consumer forces and cultural dynamics that live outside the shopping world. So while you might have strong ties with your shoppers in the retail world, your connection to them in the social web is likely weaker. The good news: people are social primates who love to share and build relationships.⁴ To build a strong and valuable connection with your shoppers in the social web, it is important to get to know them like you would a new friend. Learn what makes them tick, what they are keen on, where they hang out and how they engage and interact with others.

When observing the social web, it is helpful to consider two types of social connections—your current social connections and your prospective connections consisting of your competitors' and connections not affiliated with your industry. By distinguishing them from the start, you will be able to understand similarities, differences and how to grow your connections in the social web.

Figure 1: Types of Social Connections

When observing the social web, it is helpful to consider two types of social connections—your current social connections and your prospective connections consisting of your competitors' and connections not affiliated with your industry.



4 CCRRC/The Integer Group. (2012, February). Untangling the Social Web: Insights for Users, Brands and Retailers, Part 2: Identifying the Allure of Social Networking: Traits, Behaviors and Motivators.

HOW-TO TIP: Observing your social connections can be undertaken by internal staff or community managers using tools provided by social platforms as well as publicly available secondary research. Companies that cannot do this step internally should use a third-party researcher. In that case, Steps 2, 3 and 4 would be combined.

The following examples and exercises outline how to build a personal knowledge base about your current and prospective connections as well as how to use that knowledge to develop a learning plan and execute a listening study to help you gain a deep understanding of your social connections.

Exercise 2: Examine Social Web Activity

Examine your social web profile/activity and that of relevant competitors. As you read posts, tweets, blogs and more, ask yourself the following questions:

- What are the general demographics of your connections? How does it compare to your shoppers' demographics?
- What are the general demographics of your active connections (those who currently engage with posts, tweets etc.) vs. inactive connections?
- How do the demographics of your social connections compare to your overall shopper base?

HOW-TO TIP: Most social networks have user-friendly analytic tools that let you observe the demographic composition of your connections (see Appendix Item 1). However, this is dependent on information their members opt to provide. It might be useful to also qualitatively observe active connections and make note of the demographics of those who are most active; men or women, young or old and so on.

- On which social sites do you have the most connections?
- How has this changed over time?
- Can you connect any of your activity to boosts in connections?

HOW-TO TIP: Major social networks measure the number of connections your business has and are often able to provide deeper analytics around connection levels and can track them over time (see Appendix Item 2). Note that each site measures connections using a different vernacular. Facebook connections are called 'likes,' Friends, Fans or Friends of Fans. While Twitter and Pinterest connections are called followers.

Exercise 3: Understanding Engagement Beyond Metrics

Examine your social web profile/activity and that of relevant competitors. As you read posts, tweets, blogs and more, ask yourself the following questions:

- What types of posts/tweets generate the most activity?

HOW-TO TIP: You can tell a lot about your connections (current and prospective) by observing daily activity on your wall or the walls of competitors. Remember to consider both the content and the media provided (video, picture), and even the time of the post when assessing. Consider the following exercise before digging in to your own posts and tweets.

Q: What can you conclude about this business' connections based on these few posts?

Sandwich Video	LIKES	COMMENTS	SHARES
<p>A salmon sammy? De-lish! http://www.youtube.com/watch?v=</p>  <p>Salmon BLT and Broiled Grapefruit www.youtube.com</p> <p>Simple Meals suggests Salmon BLT and Broiled Grapefruit. To print the full recipe, click here http://www.com/aprons/meal</p>	320	80	40
Table-Manners Questions	LIKES	COMMENTS	SHARES
<p>At the dinner table, are you the first to clean your plate? Or the last to finish?</p>	370	225	2
Mother's Day Video	LIKES	COMMENTS	SHARES
<p>This one's for the moms. Check out our new Mother's Day TV commercial http://social.com/CGn</p>  <p>Mother's Day Commercial www.youtube.com</p> <p>The new Mother's Day commercial from features an expectant mom and her daughter sharing a secret or two.</p>	6,890	1,587	1,697

A: Seasonal and emotional content like the Mother's Day video generates more engagement (e.g., 'likes' and comments) than everyday conversational content. In addition, asking questions of your connections (e.g., their table manners) appears to generate more conversations and comments.

HOW-TO TIP: Some social networks have analytic capabilities that break down engagement type and put numbers to it. This is valuable, but it does not provide as much insight as reading how connectors are engaging with you in the social web (see Appendix Item 3).

When examining activity, also consider what types of topics drive your connections to start a conversation with or about you vs. just reactions to your posted content. See the example below.

Figure 2: Conversation-Starting Content

Many start conversations about things they love, hate or want answers about, including deals, new locations and sourcing.



HOW-TO TIP: Within each social network, you can search terms or content. Review your wall history, search tweets based on keyword or hashtag(#) ⁵ and examine YouTube® videos, Pinterest boards etc., in which you were tagged (see Appendix Item 4 for further help).

There are also many free tools that provide further search assistance. For example:

- + Google® Blog Search—allows you to search blog posts
- + Omgill Charts—measure and compare buzz of search term based mostly on reviews/forums
- + Addict-o-Matic—a search engine that aggregates Rich Site Summary (RSS) feeds ⁶ to let you see brand presence
- + Tweetbeep—tracks mentions of your brand on Twitter
- + Twitratr—rates mentions of your search term as positive/neutral/negative
- + Tweetstats—statistics for Twitter

⁵ Hashtags (#) are words or phrases prefixed with the symbol #, a form of metadata tag that allows one to search for these terms and strings of conversations more easily.

⁶ RSS is a family of web-feed formats used to publish frequently updated content like blogs. RSS feed or channel includes full or summarized text plus metadata such as publishing dates and authorship.

To round out your observations of the social web and prospective connections, ask yourself:

- What are relevant competitors' communities doing, talking about, posting etc.?
- What other brands, retailers or groups do they like, follow mention?

HOW-TO TIP: Facebook allows you to see the originating point where connections were referred from to get to your page or post. You can determine if their reference was the newsfeed, an app, ad or website—and even which website they came from.

STRATEGIC RECOMMENDATION: This type of free analysis provides functional, foundational knowledge. However, we advise doing further research to gain deeper insights.

STEP 3 Deepen Your Knowledge With Secondary Research

Though observing activity is effective, it is important to keep abreast of larger social networking news and research. This type of secondary research constantly monitors activity and is able to provide insight beyond your immediate observations, ultimately enhancing your knowledge of prospective connections and the larger population on the social web.

HOW-TO TIP: Parts 1 through 5 of this study provide foundational trends and knowledge about the social web, its users and trends. In addition, organizations like Mashable™ and Nielsen® Wire provide daily news and frequent reports on the social web free of charge.

Exercise 4: Understanding the Four Types of Social Connectors

Consider the four types of social connectors summarized in the following figure. Then ask yourself the following questions:

- Do your current connections mirror any of the four social connector profiles?
- Which type of social connector do you want to engage with?
- How would each type of connection impact your business?
- What new knowledge gaps does this information expose?

Note: Full profiles, including shopper behaviors, can be downloaded from the North American CCRRC website, www.ccrcc.org.

Figure 3: Four Types of Social Connectors

Social connectors differ by their motivations, values and intentions.



THE BONDER

Personality: Fun, Sociable and Connected

Primary Motivator: Create and Cultivate Relationships

Primary Activity: Observe and Absorb Content



THE CREATOR

Personality: Creative, Unique, Self-Expressive and Bold

Primary Motivator: Self-Expression: I Want to Show People Who I Am

Primary Activity: Post/Contribute My Own Original Content



THE PROFESSIONAL

Personality: Intelligent, Efficient and Organized

Primary Motivator: Share/Spread Relevant and Important Info With People/for Professional Reasons

Primary Activity: Search for Information Needed



THE SHARER

Personality: Kind, Helpful and Sincere

Primary Motivator: Share/Spread Relevant and Important Info With People

Primary Activity: Share/Comment on Content I Find That Benefits Others

Source: CCRRRC/Integer. (2012, March). Untangling the Social Web: Insights for Users, Brand and Retailers, Part 3: Social Networking Personas: A Look at Consumer and Shopper Mind-Sets.

By assessing your current set of connections as well as prospective connections, you can establish a solid knowledge base and have identified some knowledge gaps. The next stage of getting to know your social connections will outline how to develop research that will dig deeper via listening to activity in the social web.

STEP 4 Listen to Expose Richer Insights

Observing and researching activity on the social web is valuable, but listening provides you with richer insights. Integer's social media expert panel agrees and emphasizes that listening is one of the most valuable activities you can do in the social web. Listening helps you understand who your connections are as well as how and why they interact. It helps to provide insight behind every 'like,' which allows you to build meaningful long-term relationships with social networkers.

To make the most of listening, it is best to listen with intent and specific objectives. Use learnings from Steps 2 and 3 in conjunction with questions from Exercise 5 to identify knowledge gaps and expose listening objectives.

Exercise 5: Identify Your Listening Objectives

Consider the following territories (a full set of questions is outlined in Appendix Item 5) to expose knowledge gaps and listening objectives.

- What is the demographic profile of your social connections?
- What are their social, consumer and shopper mind-sets?
- How does their social web activity compare to their shopping activity?
- What drives them to engage on the social web? How do they interact with your business?
- How do your social connections compare to your shoppers?
- How have your social connections' mind-sets, habits or interests changed over time?

The areas that are left empty or require more depth should be part of your listening objectives. Generate detailed questions for each knowledge gap. This questions set will help guide your listening efforts.

HOW-TO TIP: Vet your learning plan with a cross-functional team to ensure any research efforts will aid the various departments that social listening might impact (e.g., HR, recruiting, store operations, merchandising etc.). Consult Part 7 for a baseline of potential listening objectives for HR and recruiting.

Once you have an objective, you can consider your listening options. There are simple ways to listen to your connections in the social web. But to gain a deeper level of insight about your social connections (and expose possible social roles for your business), you need to employ proper listening tools. There are two fundamental types of listening tools outlined in the following figure.

Figure 4: Two Types of Listening Tools⁷



Broad Listening Tools

Good for Research and Insight Hunting

These tools are able to provide holistic insights regarding specific audiences or topics. They provide the ability to monitor trends, topics of conversation and sentiment around your business or offering(s) and provide a holistic perspective.

EXAMPLES: Crimson Hexagon Forsight®, Netbase®, Collective Intellect®, Social Radar®



Narrow Listening Tools

Good for Engagement Analysis of Action, Response and Customer Service

These tools are designed to help you listen and engage in the moment. They provide the ability to monitor live conversations, which can help you discover new opportunities and respond to them. But these tools often lack the ability to provide historical perspective or deep analysis of content.

EXAMPLES: Hootsuite®, Radian 6, Visible Technologies®

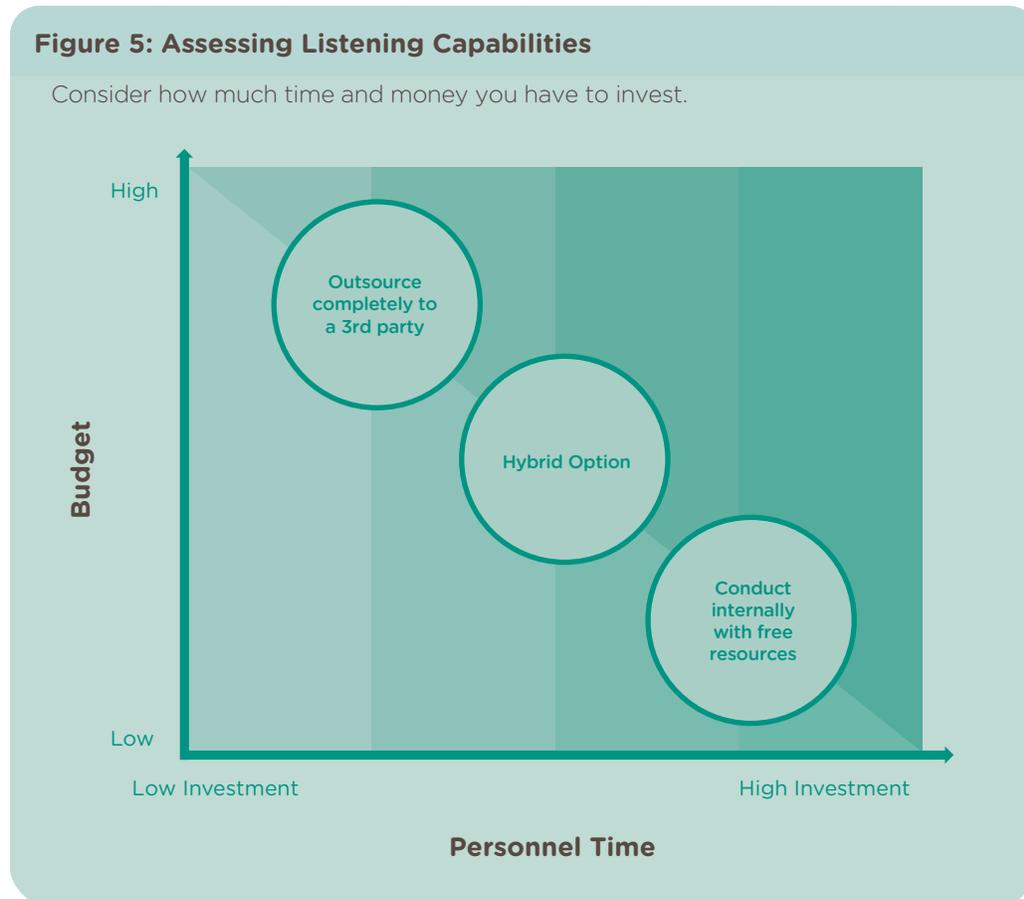
STRATEGIC RECOMMENDATION: If your primary objective is to help identify your social role, it is best to use tools intended for research and insight. These tools will provide the depth of information needed to expose connection opportunities in the social web.

NOTE: We will discuss narrow listening tools in the next section and review when it is time to set up tools that monitor activity to help you respond, engage and provide customer service.

There are many options within broad listening tools to consider. To select a method, begin by assessing your internal listening capabilities, requirements and goals. This will help you determine whether research is handled internally or through a third-party vendor.

⁷ The Integer Group. (2012). Expert Interviews.

Simplistically, assessing capabilities depends on two variables—your budget and time. Less expensive options often require you to dedicate more time of your internal personnel while more expensive options often redistribute the time commitment to third parties. Consider your budget parameters and how much time you can offer internally.



Free listening resources including Addict-o-matic, Tweetdeck, Twitratr and Omgill Charts are good for aggregating information and mentions, but they require staff to sort, analyze and interpret the data.

Moderately priced listening options like Hootsuite and Radian 6 offer more customized data and support services. But much of the analysis still requires the use of internal staff. Consider these tools as self-service data analysis tools rather than services.

Both free and moderately priced options can be time-consuming and often lack specificity for this stage of strategic development when you are looking for grounding insights to drive your strategy, vision and long-term engagement objectives. These tools are best used once your strategy is in place for monitoring.

While low-priced and free tools are appealing, we suggest using a third-party listening service. These higher-priced listening options, including Hexagon Crimson and Netbase, offer customized

listening services with support staff that will aid and/or conduct a listening study on your behalf using a suite of sophisticated tools and analysis programs. These studies often yield more specific insights and learnings that are fruitful for helping to develop your social web vision. Unlike engagement tools, this type of listening can be done as a one-off or intermittent project rather than an ongoing practice, which helps to manage the cost as well. Consider the following exercise and questions when selecting a listening service/vendor.

Exercise 6: Questions to Ask a Listening Vendor⁸

If you opt to conduct your listening research via a third party, consider the following questions when selecting a vendor:

- What are their values vs. their capabilities?
- What are their analysis methods and services?
- What are their main data feeds?
- What are their reporting tools?
- What is their process time?
- How scalable is the offering?
- How much does the service cost?

NOTE: See Appendix Item 6 for a full list of questions.

HOW-TO TIP: It is important to discuss your expectations, requirements and goals for this listening practice. Consider how much involvement and engagement you want with the researcher/vendor and what type of product you expect (raw data, presentation etc.). Also assess your needs regarding timing and cost if you have parameters in place.

HOW-TO TIP: We recommend using any established vendor-selection practice you have in your organization to engage vendors and ease the process.

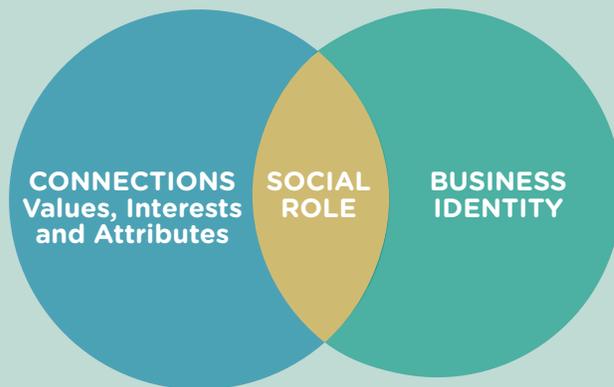
Activating the right listening plan for your needs should round out your understanding of social connections (current and prospective). However, to identify an effective social media role, you must examine more than your audience—that is merely half of the equation. Next, we must bring this understanding together with your brand character.

STEP 5 Identify Your Social Role

Now that you have honed in on a social business identity and understand your current and prospective social connections, you can identify your social role. Your social role is the sweet spot where your identity as a business overlaps with values, attributes and interests of your connections.

8 The Integer Group. (2012). Expert Interviews.

Figure 6: Finding Your Social Role



“To be successful on social networking [sites], I think you need to know your brand identity.”

—Expert Respondent

Your social role is the sweet spot where your identity as a business overlaps with values, attributes and interests of your connections.

Your social role could be very similar to your overall business identity. But it is important to consider a more narrow focus that truly taps in to an audience that shares similar values with you—allowing you to not only be relevant but also show your best assets.

One expert panel respondent even equated effective social media strategy to a marriage in that businesses succeed in the social web because they “marry those they get along with” vs. dating the entire universe.

In addition, having a narrow focus that is rooted in continually aligning your business propositions with those of your social connections helps to guide the development of effective engagement and ultimately create more meaningful connections. An iconic brand like Nike® demonstrates this well through its Nike Football Facebook page (see the following example).

EXAMPLE 1: NIKE SOCIAL ROLE FOCUSES ON PASSION POINTS

It is not surprising to discover that iconic brands tend to have strong identities. And they have leveraged their identity and values in the social web to create a large Facebook following. Nike has a personable identity. In the social web, it is apparent that Nike tapped in to its friends’ online interests and passions to expose a social role—soccer—and subsequently developed the Nike Football page. And this angle has not generated just a few followers. The Nike Football Facebook page has nearly 15.5 million ‘likes.’ That’s over three million more ‘likes’ than the main Nike page for products and services and far more than typical retailers and grocers who have anywhere from 1,000 to 1,000,000 ‘likes’ (as of January 2013).

Retailers face unique obstacles and, broadly speaking, they have been slotted as a coupon source in the social web rather than friends with whom to engage and connect. In fact, the number-one reason why people 'like' retailers on Facebook is to get a perk.⁹ But you can change that. By identifying your social role, you can uncover the best means of connecting with your shoppers in the social web. For some, this means developing a new page dedicated to a passion point or specific interest of their connections that they help fulfill. The following example demonstrates that what might seem like small communities, product offerings or retail departments could possibly ignite meaningful connections in the social web. By tapping in to these passions, brands can make many communities that are actually larger than the whole.

EXAMPLE 2: RETAILERS BREAK THE MOLD AND MAKE NEW PAGES TO CREATE DEEPER CONNECTIONS

Target's main corporate Facebook page covers a lot of topics because the retailer fulfills a lot of needs across many departments for its many shoppers. But Target® also has a successful Facebook page dedicated to fashion, called Target Style. This page demonstrates a true sweet spot for the retailer. It taps in to the shopper's passion for style and the retailer's mission to be innovative and create exceptional guest experiences. Though it does not have as many 'likes' as the corporate page, it builds a specific role through which to engage shoppers. Similarly, 7-Eleven® Slurpee® and The Starbucks® Frappuccino® have dedicated pages with nearly as many likes as the main brand page. Slurpee and Frappuccino have experienced a larger following and have developed more cult-like communities in the social web.

Finding your social role not only helps to create a stronger link between your business and connections in the social web, but it also provides the opportunity to differentiate yourself from competitors and create lasting relationships. For example, Target Style further differentiates Target from Walmart® and builds Target's position as a style retailer vs. a low-price mass merchant.

9 CCRRC/The Integer Group. (2012, February). Untangling the Social Web: Insights for Users, Brands and Retailers, Part 2: Identifying the Allure of Social Networking: Traits, Behaviors and Motivators.

Use the following exercise to help you arrive at your social role.

Exercise 7: Finding Your Social Role

- Step back, digest and analyze the learnings from your brand identity assessment and connections research.
- Examine where values, activities and character overlap to expose social role opportunity areas.
- Examine which opportunities support or advance your brand positioning and identity.
- Examine which opportunities drive the most volume/reach/buzz.
- Consider the following exercises to help articulate your social role.



Yearbook Superlatives

If you (your brand) were in high school, what superlative would it win? What quote would be under its picture?

E.g., Most Stylish,

“Do not follow where the path may lead. Go, instead, where there is no path and leave a trail.”

—Ralph Waldo Emerson



Party Prep

If you (your brand) were invited to a party, what would you bring?

E.g., I'd bring the fun, I'd bring the most delicious, yet healthy, homemade snacks etc.



Tombstone

If you (your brand) died tomorrow, what would the tombstone say?

E.g., Here lies a supportive brand who was always willing to lend a helping hand to make life's little tasks enjoyable.

HOW-TO TIP: Engage a cross-functional team when assessing options and developing your social role. Experts interviewed for this study feel this is important because it ensures that the chosen space will be nimble and dynamic enough to fulfill the needs of each department—HR, recruiting, marketing, merchandising, PR, customer service and more. Consult Part 7 for reference on how HR and Recruiting might approach developing a social role.

STEP 6 Narrow Your Sights, Identify a Social Web Objective

The first 3 steps of Section 1 have given you a sense of your positioning and role in the social web. Your social role is one element of your larger vision. To round out your social web vision, it is necessary to identify the primary business objective(s) you aim to achieve and then, ultimately, what success looks like in the social web (Step 7).

“Once brands stop thinking about social as a way to revolutionize marketing, they can start evaluating consumer lifecycles, and figure out where social fits. People look at social as a problem, but they need to look at it as a solution to specific problems.”

—Nate Elliott, Forrester Research¹⁰

The following examples and exercises will help you identify appropriate business objectives for the space and demonstrate that developing a social web vision and strategy can provide specific solutions for larger business issues.

While your business likely has many objectives, it is important to narrow your sights on a select one or two for the social web. Dependent on your business, social web objectives vary, but at a fundamental level, there are four territories that lend themselves to the social web: sales, customer service, marketing and brand building.

¹⁰ Gavin O'Malley. (2012, June 6). Social Setbacks. Message Posted: <http://www.mediapost.com/publications/article/176303/social-setbacks.html>

Consider the following objective territories, exercise and example to hone in to your own objective(s).

Figure 7: Social Web Objective Territories



Exercise 8: Objective Territory Exploration

Ask yourself:

- Do any of these territories have synergies with my social role?
- Are any necessary for my business to focus on no matter what their link to social?
- What is being overlooked elsewhere in my marketing and operations?

Though many business objectives typically aim to increase or improve an element of the business (especially sales), it is important to consider evolution and change as well. Rather than just thinking about how Facebook can drive sales, consider how it can change your brand perception among shoppers or evolve how you run customer service or engage with shoppers.

Now ask yourself:

- What business objectives am I trying to achieve that only social can help with?

EXAMPLE 3: BRAND USING SOCIAL TO CREATE CHANGE VS. DRIVE SALES

Chipotle® is one business that has tapped in to the social web to create change. In a highly competitive quick-serve industry, Chipotle is always looking for ways to increase sales and awareness. However, the business decided to mix things up and set their eyes on creating change. It has one simple goal of creating food with integrity in hopes that Chipotle can change the way people think about and eat fast food." Chipotle made an effort to get people to start

11 Chipotle. (2012, June 18). Chipotle Reaches Pasture-Raised Dairy Milestone. Retrieved from: <http://ir.chipotle.com/phoenix.zhtml?c=194775&p=irol-newsArticle&ID=1706043&highlight=>

considering where their food came from. The social web was an essential tool that allowed Chipotle to build conversations and engagement around this mission. It is highly unlikely that people would have had lengthy conversations about Chipotle coupons. We are sure that Chipotle's ability to deliver a rewarding social experience led the Chipotle community to show their monetary support as well.

After you have chosen a few objectives, use the following exercise to ensure they work with your social role:

Exercise 9: Status Update

TWEET IT:

Using less than 140 characters, write a Tweet (can include photos, video, promotions or other tactics) that addresses an objective while demonstrating the social role you have identified. Are some territories easier to write posts for than others?

HOW-TO TIP: Consult with Part 7 of this study—the guide to Internal Strategy—as well as your HR department to consider how your objectives will impact other disciplines using the social web.

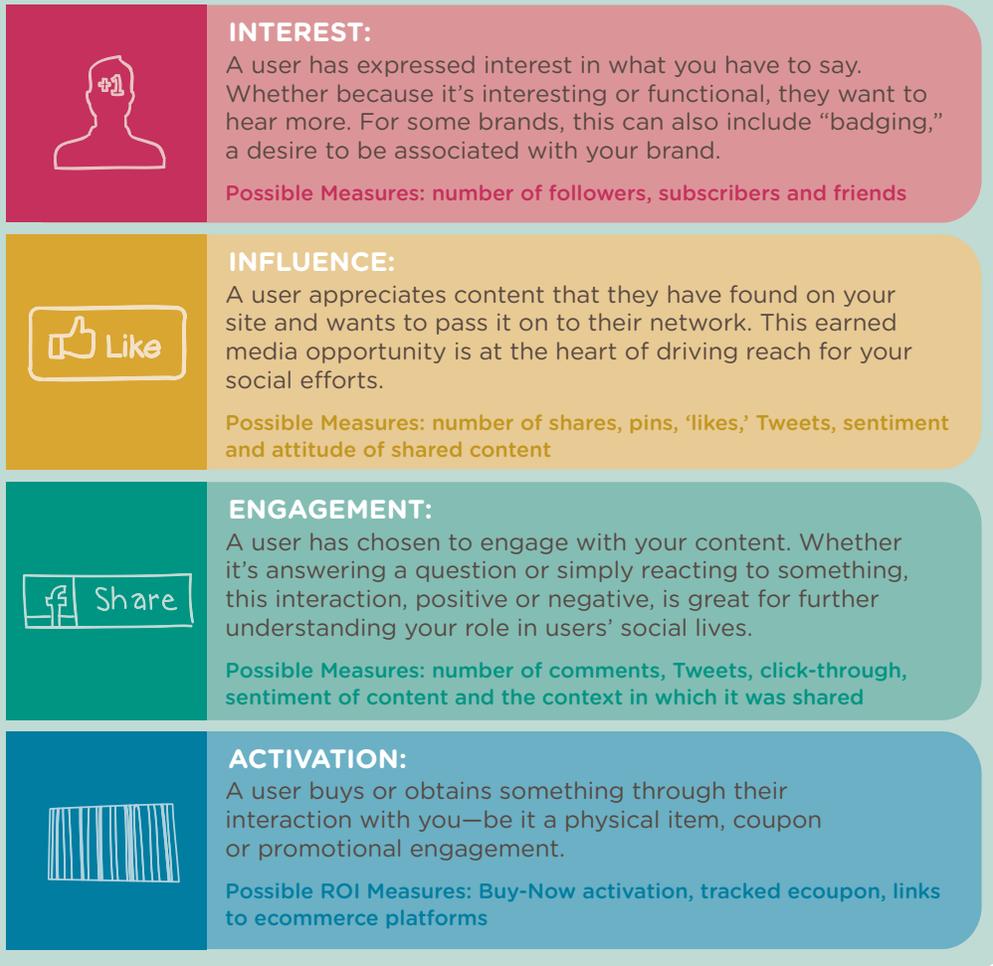
Once you have determined your business objective, consider what you hope to achieve. The final part of this paper (Section 4) explores various ways to measure return, but it is important to understand basic success measures at the outset so you can create a vision, execute, listen and monitor its activity with a goal in mind.

STEP 7 Envision Success and How to Track It

Identifying success and knowing how to gauge it is the final piece needed to develop a holistic social web vision. But it is important to know that success in the social web means many things—'likes,' Tweets, positive comments, participation etc. And some of these things can be measured more easily than others.

Simplistically, there are either hard or soft success metrics. One is not better than the other. In fact, soft metrics are often the most revealing when it comes to gauging success in the social web. So, rather than thinking about success in terms of numbers, consider what each gauge is telling you about your activity—generating greater interest, influence or engagement with your brand. Consider the four dimensions of success outlined in the following figure.

Figure 8: Four Dimensions of Success



Defining success relies on your objectives and social role as well. Examine all your inputs when envisioning success to be sure they work seamlessly together and create a seamless vision. Consider the following example to see how your objectives and role affect and partly dictate what success looks like in the social web.

Figure 9: The Elements of a Social Vision in Action

EXAMPLE 1			
OBJECTIVE	ROLE OF SOCIAL	DIRECT SOCIAL MEASURES	DIRECT RETAIL MEASURES
Increase sales of a certain category	Engage users by offering exclusive social-only events, limited products or deals	<ul style="list-style-type: none"> • Increase in interest and influence metrics during promotion • Category-specific mentions in engagement behaviors • Rise in online transactions 	Increase sales of a certain category
EXAMPLE 2			
OBJECTIVE	ROLE OF SOCIAL	DIRECT SOCIAL MEASURES	DIRECT RETAIL MEASURES
Drive brand loyalty	Create a social environment where users can interact with the brand to keep it top of mind	<ul style="list-style-type: none"> • Long-term positive trends in interest and influence metrics • Increase engagement positive sentiment • Increased traffic to retail website 	Long-term rise in same-store sales and/or loyalty card enrollment

Once you have determined how you are going to envision success and understand the dynamics of your social role, objective(s) and metrics as a whole, you have generated a complete social web vision.

HOW-TO TIP: Capture your social web vision and all its elements as if it were a new mission statement. Keep it on hand for all involved so that, as you progress in your strategic development and engagement, you can stay on track.

STRATEGIC RECOMMENDATION: It is important to remember to revisit your social web vision and all its elements as pieces may evolve over time.

CONCLUSION

Having completed this first section, we hope that you have not only established a strong, focused vision for your presence and participation in the social web but also learned the value of listening. It's imperative to listen to your shoppers, social connections, your business and marketplace. Listening is a foundational element of being in the social web and you should continue to listen and learn. The next section outlines, among other things, how to set up on-going listening tools that will help you engage, measure success and provide customer service.

SECTION 2:

SET UP YOUR SOCIAL WORLD:

HOW TO IDENTIFY PLATFORMS, ASSESS RESOURCES AND POSITION YOUR BUSINESS

OVERVIEW: Section 2 consists of 6 steps that will help you set up your resources and operations for engaging on the social web.

- STEP 1:** Understand Where Social Fits In: outlines how social media fits in with other paid, earned and owned media.
- STEP 2:** Pick a Social Platform: explains the various platform options and how to use your knowledge from Section 1 to select the best platform for your vision.
- STEP 3:** Set Up Your Social Platforms: provides best practices on how to set up platforms for success.
- STEP 4:** Assess Your Staffing Capabilities and Needs: offers guidance on how to determine your staffing needs and considerations for using internal and external staff.
- STEP 5:** Select Additional Listening Tools: digs into what to consider when setting up narrow listening tools that will monitor social web activity.
- STEP 6:** Establish Your Social Voice: provides exercises that shape your social role into a true personality.

STEP 1 Understand Where Social Fits In

Many brands and retailers enter the social web with the impression that it's a new, free way to message what they are already marketing. With this approach, brands have mistaken this as a place where strategy is secondary. However, as demonstrated in Section 1, businesses can have tremendous success in this space if they have a clear social role and strategic vision specifically for the social web. And much of this success relies on their understanding of where and how social media fits both into and complements overall marketing efforts.

Traditional marketing considers messaging to shoppers as either paid, owned or earned media. However, social media is different, less clear-cut and it continues to blur the lines between what is paid, owned or earned—especially in the eyes of social networkers.

The following chart outlines the fundamentals of paid, owned and earned media. It's important to understand this before you select social media platforms or roll out a robust strategy, because they all need to work together.

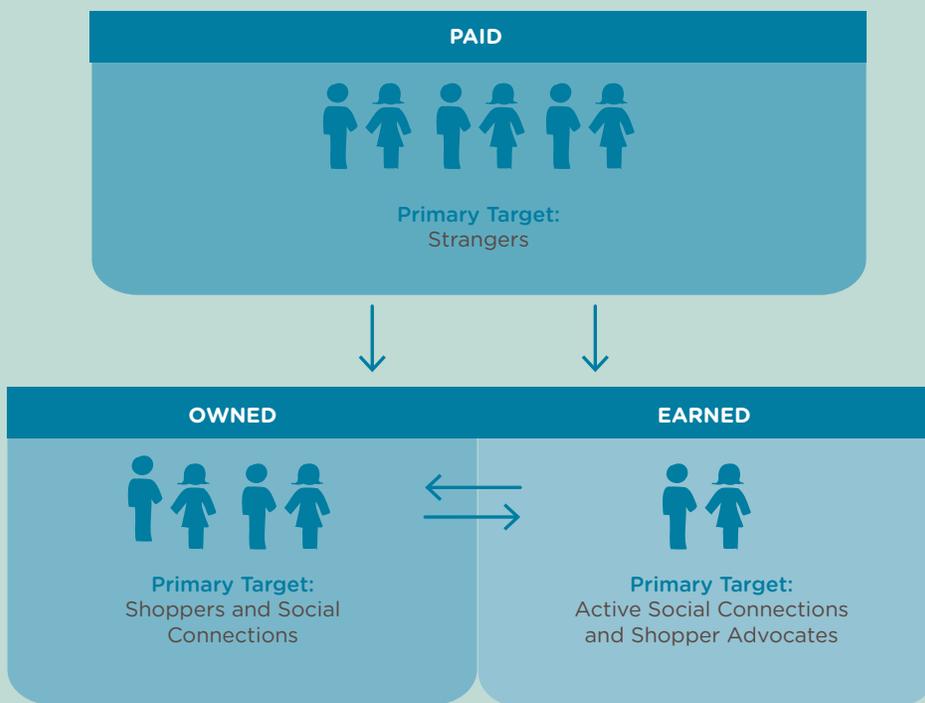
Figure 10: Paid, Owned and Earned Media Defined for the Social Web

	PAID	OWNED	EARNED
What Is It?	Media that is purchased by the business or through a media-buying agency	Media/content that the business controls	Conversation, discussions and “buzz” about your business
Its Purpose	Creates awareness and can reach a new or specific audience	Helps business tell its own story, explain its values and what differentiates it from competitors	Generate organic word of mouth by giving people a reason to talk about the business
Traditional Examples	TV, Print, Radio and SEO (search engine optimization)	Website, Packaging, App and Circular	Word of Mouth, Editorials and News Coverage
Social Media Examples	Facebook Ads, Sponsored Blogs, Amazon Vine and Ambassadors	Facebook page, Twitter Feed, Blog and Website With Facebook Function	Comments, Posts, Tweets, Pages, Pinterest Boards or Other Elements Started by Shoppers

When it comes to the social web, these elements become increasingly intertwined and reliant on each other. Each can generate a unique emotion and then the three can work together to create an experience for the shopper. The following chart and exercise show the relationship between these three types of media and how they impact emotions, mind-sets and behaviors.

Figure 11: Relationship Between Paid, Owned and Earned Media¹²

Though each aims to reach a distinct set of social connections, they work together to amplify messaging with the goal of creating strong relationships and advocates.



STRATEGIC RECOMMENDATION: Social web strategies should focus on using owned media to generate earned media. Generally speaking, paid media does not offer the level of credibility that it once held. Shoppers are now more skeptical of paid media and are starting to rely on recommendations from friends and word-of-mouth referrals as sources, both of which social is prime to provide. However, as the social web continues to evolve, paid media may become a more compelling force for amplification.

¹² Sean Corcoran. (2009, December 16). Defining Earned and Owned. Message Posted: http://blogs.forrester.com/interactive_marketing/2009/12/defining-earned-owned-and-paid-media.html

Exercise 10: Imagine Each Medium in Action

Consider how you react to a brand that posts a great photo of your favorite beverage on a hot day at a fantastic beach setting. You see that several of your friends have either liked or engaged with that photo by the time you see it. Now, contrast those feelings to an advertisement that you see as you scroll through your favorite news website. This same ad offers you a free trip to Mexico by participating in a sweepstakes.

While both may generate awareness, the means by which they do so are completely different. The first example makes the brand personally relevant because your friends have already interacted with it. In contrast, the second example feels less personal and relies on the promotion to get your attention.

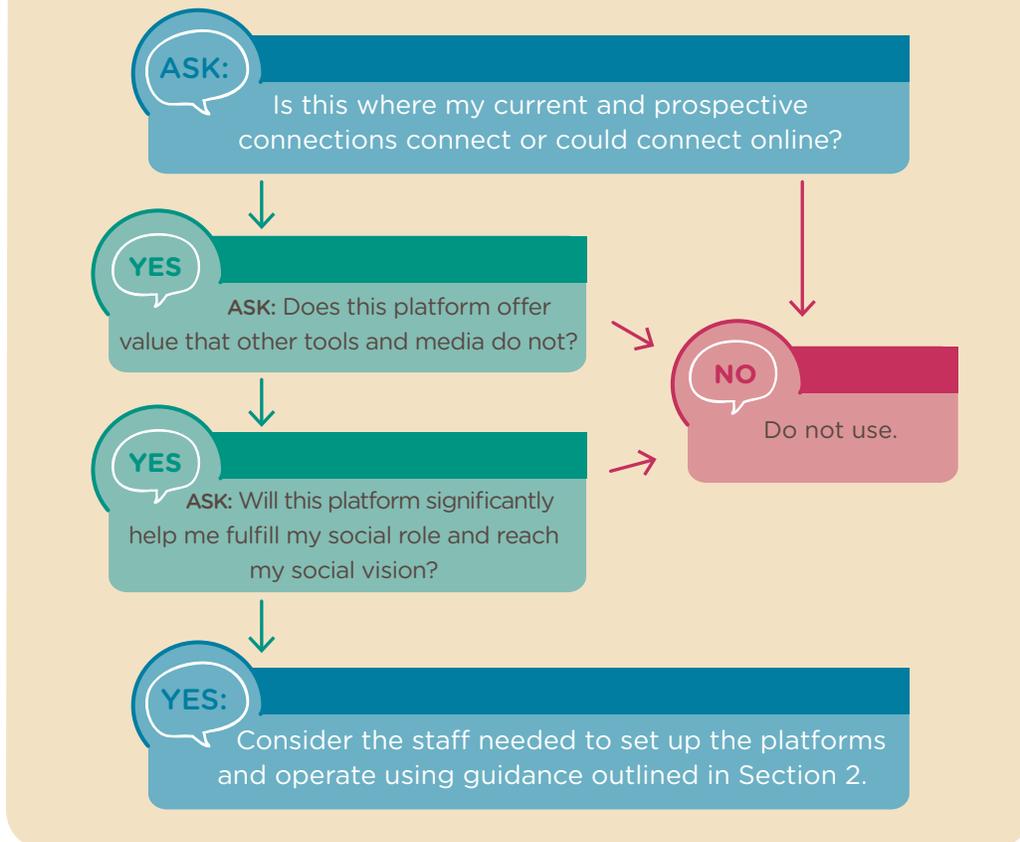
Because each type of media can generate different emotions, you must plan your social strategy and select social platforms with other media in mind. Determine how you want shoppers to feel when they see you on Facebook, in the newspaper and on TV. A coordinated media effort will explore a shopper's range of emotions and encourage behavior change and engagement with your business.

STEP 2 Pick a Social Platform

In the first section, you used listening research to identify the online behaviors of your current and prospective connections. Use these insights as a starting place for choosing your platforms. These insights will also help determine both how and which platforms will interact and intersect in terms of your communication strategy. For example, if you found that most of your current and prospective connections are on Facebook, tailor your posts to their passions. Or, if you see that the majority of your connections are on Twitter, optimize conversations with engaging Tweets to make your business a part of their online habits.

Next, consider your social role and vision (as stated in Section 1) as well as the functionality and positioning of each platform. To learn more about your platform options, use Appendix Item 7, which details the top social platforms in conjunction with their websites. These three inputs will help you hone in on the proper social platform for your needs. Use the following exercise to vet social platform decisions.

Exercise 11: Platform Selection Decision Tree¹³



HOW-TO TIP: Just because there are many platforms does not mean you need to be present on all of them. Feedback from Integer’s social media expert panel indicates that it is better to use one platform well than to participate on all platforms poorly. If and when you participate on multiple platforms, make it easy for connectors to know where they can engage with you.

HOW-TO TIP: Build relationships with bloggers rather than creating your own blog. This will allow you to tap in to an existing community through a voice that commands attention. One expert respondent notes, “Brands have to have relationships with these people because they can change peoples’ opinions and have access to a lot of people.”

To see how retailers have chosen platforms that suit their connections, objectives and business, look at the following Target example. Target takes an interesting approach to its Twitter and Facebook accounts.

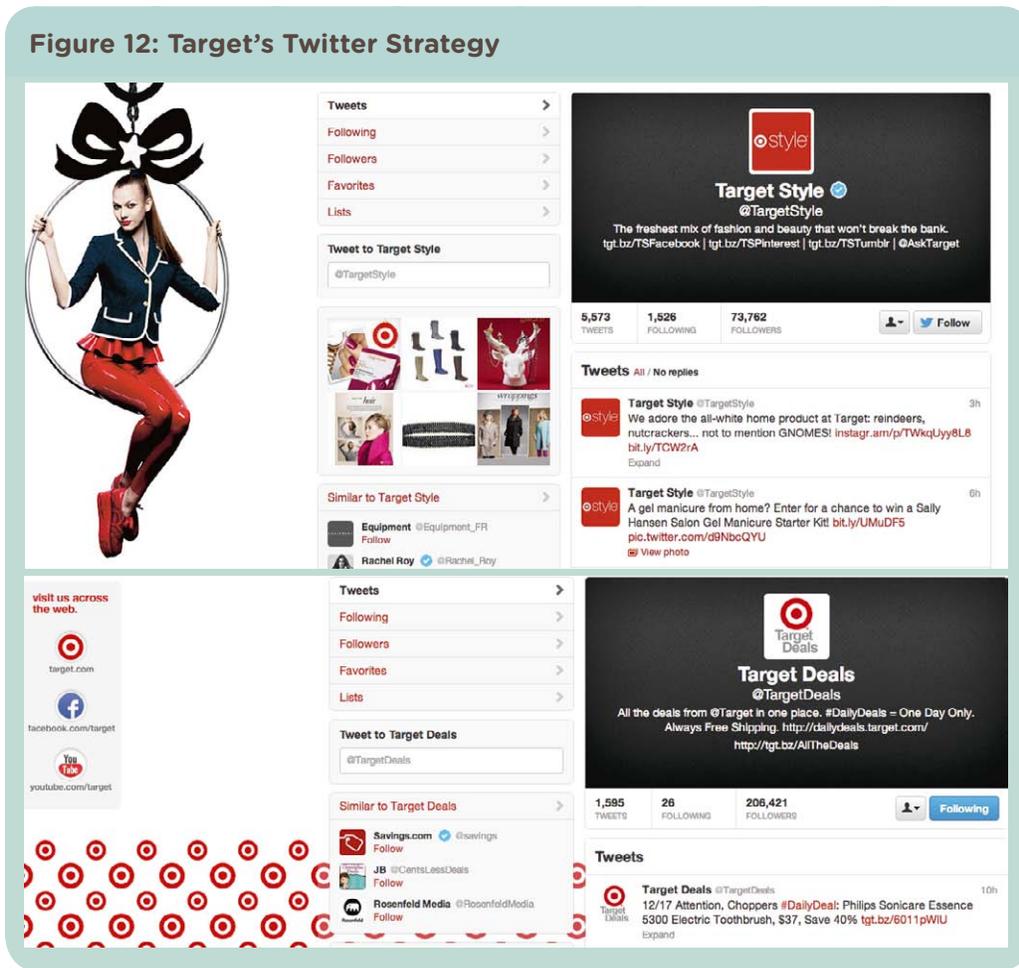
¹³ Debra Askanase. (2011, July 1). Social Media Decision Trees:When to Dive Deeper. Message Posted: www.communityorganizer20.com/2011/07/01/social-media-decision-trees-when-to-dive-deeper/

EXAMPLE 4: TARGET'S STRATEGY¹⁴

Target has multiple Twitter accounts to accommodate the breadth of its portfolio. The main account is for corporate/customer relations. It also has an account for Target Fashion, Target Baby and a Target Deals feed. This approach gives users the option to pick the exact information they'd like to receive rather than simply offering a one-size-fits-all approach. For instance, Target Deals only tweets a daily deal to followers on that account. However, if you're a shareholder and looking for corporate information, the Target Deals account will not have the information that best fits your needs.

Target is a great example of how using various social properties can effectively meet different needs for its shoppers. Target's Twitter accounts are tailored to the different needs of shoppers while its Facebook page is used more as a way to engage fans and provide information.

Figure 12: Target's Twitter Strategy



14 Target twitter strategy meets the needs of different consumers like style (<http://twitter.com/TargetStyle>) and deals (<https://twitter.com/TargetDeals>)

STEP 3 Set Up Your Social Platforms

Though setting up a Facebook page or Twitter account might seem cut and dried, responses from our social media expert panel indicate that you should take the time to set up each platform properly. Follow this list of best practices to set yourself up right.

- Choose brand account when given the option (Facebook will have this option).
- Create a clear and recognizable name for your business, especially for a Twitter account.
- Determine a photo or brand logo that will best represent your brand, this will be the face of your brand for the account.
- Include a brief description of your business and other business-operation information like locations and hours.
- On Facebook, immediately try to attract fans and ‘like’ other pages that are relevant to your demographic.
- On Twitter, immediately start to follow those who follow you, and follow brands that are relevant to your demographic and will give you content to retweet (abbreviated as RT), respond to and share.

HOW-TO TIP: Conversations with Integer’s social media expert panel indicate that you should consult with your IT department as you set up your social infrastructure. Ensure that any and all content is flexible for the various devices that might be used in your business, including computers, tablets and mobile phones.

While setting up your platform profile correctly the first time is important, it is also important to stay abreast of platform changes and evolve with them. For example, Facebook’s Timeline format changed the way individuals and businesses express themselves—allowing them to have a visual banner and more customization and storytelling features. Stay alert to changes like these and reach out to the platform with questions, because they often have guidelines and recommendations for using new platform configurations and features.

STEP 4 Assess Your Staffing Capabilities and Needs

Though it is difficult to predict the success or the outcome of your activity on a given platform, what you can control are the resources that will and can help guide your efforts, navigate crises and lead you to success in the long run. And the most valuable resource for your social web strategy is your staff. These will be the people who engage with your shoppers in the space. To that end, you’ll need to know what staffing resources are at your disposal and what you will need to invest to provide quality engagement.

Some businesses that have a very large footprint and engage in thousands of conversations each day on multiple platforms have numerous people working exclusively within social media for the brand.

Others that have a smaller footprint spread the work across their existing team. The take-away is that you will need internal staff to dedicate time to your social efforts.

Here are some questions to ask when beginning:

- Do you have a social media guru(s) in your midst or in other departments?
- Are there areas in your organization that are underused that could be used for this purpose?
- Could social media responsibilities be leveraged across departments, making everyone responsible for the health, life and success of the social space?

HOW-TO TIP: Staff should be integrated with the marketing department. Feedback from Integer’s panel of social media experts indicates that effective social execution relies on staff involvement in the overall business.

EXAMPLE 5: ZAPPOS®

Zappos, an online retailer of shoes and lifestyle goods and a subsidiary of Amazon.com®, places the responsibility of the social web heavily on its employees. The company allows any of its trained employees to respond to shoppers and has built a large team of employees to ensure that all comments get a quick response.¹⁵ While this might not be possible for every brand and company, the idea is to properly identify the current resources you have to see exactly what you need to seek from those outside your walls to help you in the social space.

There are many aspects of running social media operations that staff must handle—building a community, starting conversations, responding to comments and monitoring activity, to list a few. In addition, you need resources to lead the strategy and analyze the effectiveness of your efforts in the social space. This is especially important to understand so you can staff appropriately. For some smaller companies, this might be done by a handful of people working within the larger marketing/advertising department to give a holistic approach. For larger companies, this could involve a team of people who work closely with traditional approaches to achieve the same goal.

STRATEGIC RECOMMENDATION: Consider hiring several staff members to operate and monitor the social strategy. Integer’s social media experts say it is essential to have several staff members (be they company employees and/or staff hired to work on your behalf via a third party). Ample staffing ensures that operations run smoothly when any individual takes leave.

15 Karl Stabib. (2010, March 3). Unleash Employees’ Inner Creative Marketing Talents – Rehumanize Business Part 2. Message Posted: <http://www.workhappynow.com/2010/03/unleash-employees-inner-creative-marketing-talents-rehumanize-business-part-2/>

If you have determined that the sheer volume of communication and the resources it takes to tackle this kind of conversation is beyond what you can handle with your current staff, consider looking to outside third-party groups and agencies to handle your social media efforts. Today, this service is provided by marketing agencies, advertising agencies, media agencies and even public relations agencies. The following figure outlines a few advantages to each choice. Again, the decision should be based on the resources you currently have and the amount of time and money that it will take to achieve the business goal you've defined.

Figure 13: Staffing Resource Considerations¹⁶

Internal Resource	<p>PROS</p> <ul style="list-style-type: none"> • Experts in the industry/brand • Provide an authentic brand voice • Embedded in the teams to aid collaboration 	<p>CONS</p> <ul style="list-style-type: none"> • Little previous experience in the space • Not experts in social web • Variable bandwidth • Overhead • Typically no industry-leading people
	<p>PROS</p> <ul style="list-style-type: none"> • Experts on the social web • Little training required • Fresh perspective and forward thinking • Success record of managing effective programs • Simple to add/reduce resources • Flexibility in resourcing • Up-to-date skills 	<p>CONS</p> <ul style="list-style-type: none"> • Cost • Physical location may inhibit their ability to integrate and work with internal teams • Do not live and breathe the business; risk of providing an inauthentic voice
Third-Party Resource		

HOW-TO TIP: Regardless of how you staff up, it is important to inform and train staff on company policies regarding social media engagement as well as refresh them on how federal laws apply to the social web. Consult Part 7 of the CRRRC report for legal information, help revising your company policies/handbook and training staff.

¹⁶ The Integer Group. (2012). Expert Interviews.

STEP 5 Select Additional Listening Tools

Having chosen your platforms in Step 2, familiarize yourself with their monitoring and measurement functionalities. Each platform has its own set of analytics—some of which were described in Section 1. When reviewing functionalities, ask yourself: Based on my business objective, will I be able to achieve this while using the tools I currently have or with tools that are free of charge?

You can operate with the provided analytic capabilities, but they might not provide the depth needed to achieve your strategic goals. For example, some vendors have developed tools that show a brand's influencers or the optimal time and day of the week to post conversations. Hootsuite, Radian 6 and Visible Technology are a few vendors that offer more advanced analytics.

Unlike the broad listening tools used in Section 1 for learning about your connections, these narrow listening tools are intended to assess in-the-moment engagement. More specifically, they provide the ability to monitor live conversations, which can help you discover new opportunities and respond to them strategically to advance your social role and achieve your social vision.

STRATEGIC RECOMMENDATION: Subscribe to a broad listening tool. They provide real-time information and tracking to guide your efforts.

To select a broad listening tool, it is important to know exactly what you need. Remember, only you or your social team will know that based on your social role objectives. To help you articulate your needs, follow the methodology and vendor question set outlined in Step 4 of Section 1, taking into account some of the nuances of narrow listening tools outlined on the following page.

NUANCES OF NARROW LISTENING TOOLS:

- **AUTOMATIC RESPONSE:** Automatic responses fulfill the requirement of responding, but miss the opportunity to really provide a personal engagement with a social connection. The social web is personal and so should be the approach. We recommend using automatic response only when necessary.

HOW-TO TIP: If possible, manual/personal engagement always trumps generated responses or robotic replies. Social networkers prefer to speak with live representatives than interact with a computer when real issues arise.

- **SUPPORT STAFF FOR HIGH VOLUME:** The sheer volume of conversation you expect might affect your tool selection. Are you just starting and receiving a few comments each hour or are you receiving thousands of posts in a matter of hours, which makes a manual approach unrealistic? If so, there are tools and vendors who can help alleviate this pressure. They can manually provide you with supplemental support to respond to people.
- **MULTI-PLATFORM ANALYSIS:** Are you operating on multiple social platforms? If so, there are vendors and tools that create dashboards to show you what is happening across all platforms at all times.

HOW-TO TIP: Hootsuite¹⁷ is one popular dashboard used for this purpose. For a small monthly fee, it aggregates the communication both from you and to whom you are speaking to give you a one-glance approach to everything happening in your social space. It is a simple, low-cost option for small businesses or those looking for an easy-to-use listening dashboard. Tweetdeck¹⁸ is another similar product that creates a comprehensive dashboard for you to see all your efforts and even provide reports.

17 Hootsuite is a social media platform aggregating tool (<http://hootsuite.com>)

18 Tweetdeck is a social media tool that supplies a comprehensive dashboard and reports (www.tweetdeck.com)

STEP 6 Establish Your Social Voice

The final element to set up before you have a holistic social strategy is creating your social voice—the tone, syntax and style in which you bring your social role to life in the social web. You may think that only glamorous or quirky brands can have a charismatic voice in the social web. However, that is not the case. Integer’s social media panel of experts believe that any business can be charismatic. Regardless of what you sell—you need to be prepared to have real conversations. In the words of one expert respondent:

“It’s a media for real connections and real dialogue, brands need to be prepared to have real conversations. Don’t overthink, just jump in and be genuine.”

The following chart outlines some fundamentals to consider when establishing parameters for your social voice:

DO

- Talk like your connections would
- Consider this to be a distinct voice that only lives online
- Take into account what your competitors are doing
- Communicate frequently

DO NOT

- Pretend to be something or someone you are not
- Stray too far from your marketing voice
- Let your competitors entirely dictate what you do
- Overload your connections with excessive posts

Use the following examples and exercises to help you articulate your social role as a social voice.

EXAMPLE 6: WHOLE FOODS

The following are a few posts from Whole Foods. Notice how the voice mirrors how social networkers speak.¹⁹ Also note that the company’s voice and content connects to in-store messaging that focuses on events outside the store.

19 Whole Foods uses Facebook (www.facebook.com/wholefoods) to establish a voice within the social web

Figure 14: Whole Foods Social Voice



Exercise 12: Finding Your Social Voice

WHAT IT IS. WHAT IT ISN'T

- This exercise is used to direct the creation of your voice and to identify possible pitfalls. Ask yourself: Is your brand extremely approachable? Is your brand oftentimes witty? Is your brand not trendy but still up on trends? These differentiators will be very helpful in establishing who you are in this new space and will lend itself to continuity with the brand's voice moving forward.

WORD CLOUD

- Make a collage of the words that describe and portray your brand. Things like how your brand would use punctuation or what types of words your brand would use to describe something. These attributes will all lead you to creating a defined persona for your brand.

HOW-TO TIP: Above all, the voice must be approachable and transparent. So whether it comes from your mascot, your CEO or your employees, your voice must make people want to engage, and it must add value in some way.

CONCLUSION

Though this section is intended to set you up for smooth sailing and engagement in the social web, it is important to remember that the social space is constantly evolving. Try to be as nimble as the social web. Like your objectives, your platforms, resources and voice can be changed, if needed, to meet the ever-changing space. Luckily, the barrier to entry for the space is very minimal and, oftentimes, a test-and-learn mind-set is key to finding an approach that works best. All of your actions and efforts in the social space should be continuously optimized based on your performance and wins/losses against your overall goals.

SECTION 3: ENGAGE BY CREATING AND EXCHANGING CONTENT

OVERVIEW: Section 3 consists of two steps that outline ways to effectively engage with your social connections.

STEP 1: Know the Rules of the Road: outlines six best practices for engaging in the social web regardless of your role or objective.

STEP 2: Activate Your Social Role: explains four fundamental means of engaging with your social connections, including promotions, value-add content, localized engagement and customer service.

STEP 1 Know the Rules of the Road

A. ENGAGE LIKE A PEER

Social media has transformed the traditional business monologue into a two-way conversation with consumers and shoppers. Its contagious nature implores us to ask how we can manage such an omnipresent force. The first thing to remember is that successful conversations require you to participate as a peer. It holds more weight to speak as if you are an equal, rather than an authority in the social web. Eileen Brown of The Social Customer explains, quite simply, the reason why peer-to-peer engagement works so well:

“We tend to identify more strongly with people like us. We love those who are like ourselves. We identify with them.”²⁰

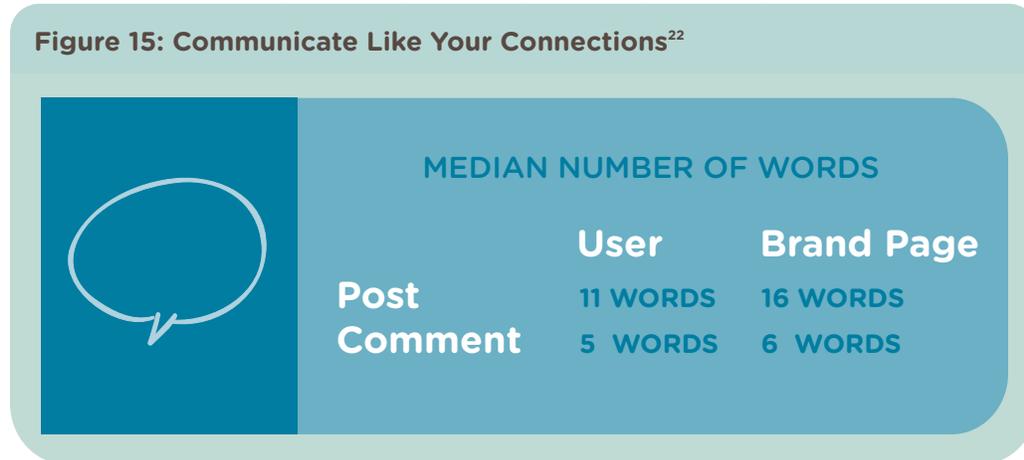
Reflect on how you would develop a relationship offline. It takes time, several interactions and common interests to reach a level of trust and camaraderie. Likewise, a single interaction with a business doesn't make someone a brand advocate. This relationship is built over time with multiple, often brief, interactions. Approaching the social web with this mind-set can also help you reshape your role. Grocers are often perceived to be functional by shoppers—a place to buy milk and bread—but engaging as a peer on the social web can help grocers evolve from functional to emotional entities among their connections.

When communicating with your social connections, remember to be genuine and express your brand personality and point of view. Spend about 80 percent of the time providing valuable content

²⁰ Eileen Brown. Online Peer Influence and Its Effect on Engagement. Retrieved from: <http://thesocialcustomer.com/eileenb/38681/online-peer-influence-and-its-effect-engagement>

and 20 percent promoting yourself.²¹ You can build more influence and trust with the added value you provide your followers. In addition, social networkers communicate frequently but do so in brief conversations, and so should you. The following chart illustrates the median numbers of words users (shoppers) versus pages (businesses) use to communicate via Facebook posts.

Figure 15: Communicate Like Your Connections²²



HOW-TO TIP: Give valuable content—people like friends who bring something to the party.

B. BE AUTHENTIC

Authenticity is the key to resonating with your connections. They’re savvy and can smell marketing speak a mile away. One way to do this is to write as you would talk. What people respond and react to, even people who are well aware that they’re being marketed to, is authenticity. As was mentioned earlier, find your brand voice and stick with it across all touch points. People want to know there’s a human being behind the scenes who’s typing the messages in the social web.

Consider this: “At a cocktail party, you wouldn’t walk up to someone and say, ‘Hey, I’m Dave. My stuff is 20 percent off.’” shares Dave Kerpen, CEO of Likeable Media.

“What you do is ask questions, tell stories, listen and relate to people.”²³

21 The Integer Group. (2012). Expert Interviews.

22 Michael Jaendl. (2012, June 12). Why Fans Share and How Brand Can Capitalize on It. Retrieved from: <http://mashable.com/2012/06/12/fans-share-brands-capitalize/>

23 Ross McCammon. How to Find Your Authentic Voice on Social Media. Retrieved from: <http://www.entrepreneur.com/article/222779>

HOW-TO TIP: Remember to listen as much as you talk. It's important because, given the incredible speed of social media, your message can go from trusted to falling out of favor in the blink of an eye. The number-one thing you can do to ensure authenticity and trust when connecting in the social web is to think about what your message means to your audience. Make this your guiding principle.²⁴

EXAMPLE 7: KLM® AIRLINE

KLM airline kicked off its social media program by addressing a specific insight—people spend a lot of time in airports. The company decided to surprise passengers who mentioned a KLM flight via Twitter or foursquare®. The KLM team used social media profiles to learn a little more about these travelers, enabling the team to respond with appropriate perks such as a travel book for the hopelessly lost or a sports watch for the casual runner. These random acts of kindness took a little more effort than generic communications, but the response was rewarding. Travelers were only too happy to share their KLM experiences online with others. And nothing is more authentic than shoppers speaking on behalf of your brand.²⁴

Figure 16: KLM Airline Example



C. BE TRANSPARENT

It's important to be transparent about who you are and what you stand for. Along with the rise of rapid information availability comes easy access to how things are made, how much they can cost elsewhere, where they come from and how aligned a business is to what it stands for. Integer's panel of social media experts knows that conversations will happen about their businesses regardless, so they know it is important to attempt to join the conversation and possibly shape perceptions.

HOW-TO TIP: Be open with your connections and address issues as they come up in real time.

²⁴ Valerie Buckingham. (2012, March 27). 4 Tips For Authentic Online Engagement. Retrieved from: <http://mashable.com/2012/03/27/tips-for-authentic-online-engagement/>

EXAMPLE 8: KASHI®

Natural foods company Kashi waded into a public debacle when shoppers discovered that its products contained genetically modified organisms (GMO) ingredients. This spurred a flurry of postings on the Kashi Facebook and Twitter pages, mainly consisting of negative comments about the recently unveiled truth. Kashi responded quickly with online videos and press releases stating their goal to have all their products be 70% organic and non-GMO by 2015. It also brought to light another issue that has proven very confusing for shoppers—that the term “natural” has no FDA regulations attached to it. “Natural” doesn’t encompass being organic or non-GMO. As the most widely distributed natural cereal, Kashi inadvertently became the catalyst for bringing this message to the masses. Instead of shrinking from the criticism, Kashi seized this opportunity to have a dialogue with its audience and be completely transparent about the company’s values and goals.

D. BE SHAREABLE

To create an infectious reaction in the social web, you must design your activities to have an inherent social motivator that spurs broader engagement and sharing because it’s expected among today’s social networkers. As one expert respondent stated:

“People have become more comfortable with the cloud and using multiple devices to access the same information. They expect everything to be integrated and to be shareable across platforms.”

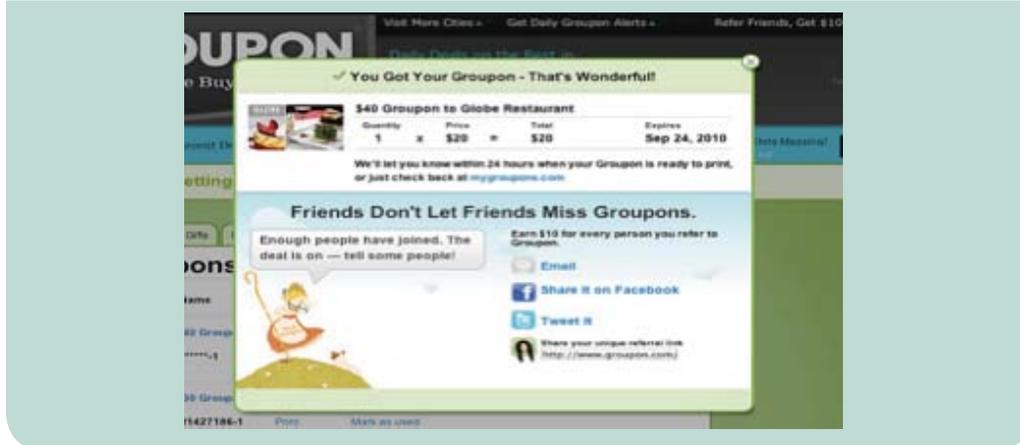
This can be done by consistently sharing new content with shoppers and providing opportunities for them to share back. Offer experiences that shoppers will feel great about passing along. Your shoppers gain a badge of honor by publicizing content that piques the interest of others. The ‘like,’ comment and share buttons on Facebook are just ways to help people talk, and they invite this type of behavior.

HOW-TO TIP: Always have an easy button for your connections that makes sharing one click away.

EXAMPLE 9: GROUPON®

Groupon makes sharing with others easy on the social web. Once a shopper has made a purchase on its site, Groupon prompts them to publicize the fact that they just got a great deal (with the simple click of a button) or entices them to spread the message further with a “get 3 friends to also buy this deal and yours is free!” offer. See the following figure.

Figure 17: Groupon Example



E. HAVE A PLAN (BUT BE FLEXIBLE)

The social web is constantly changing, and it can seem like an enormous challenge to keep up with it. Luckily, businesses have the luxury of being able to plan most of their posts, tweets and comments ahead of time. This helps you be more effective in the social web because you can ensure that your efforts are consistent and relevant to your business goals and your shoppers. Integer’s panel of social media experts agrees with this approach and considers it “calculated authenticity.”

HOW-TO TIP: Consider the four types of content outlined in Step 2 of this section when developing your content calendar. Having a varied editorial mix will help keep your connections engaged and/or attract new connections.

Nonetheless, experts also indicate that engaging in the social web is an ongoing learning process that requires flexibility. So, though it is important to keep to your schedule, you also need to have the resources on hand to post and tweet about current events and respond to comments. This will make your business more relevant to your connections and help you build your connections by keeping the conversation going. This is not an “if you build it they will come” type of scenario. You have to keep at it.

EXAMPLE 10: KING SOOPERS®

King Soopers practices this by keeping up with daily postings and responding to any feedback (comments) it gets from shoppers. This practice serves as an extension of the customer service department.

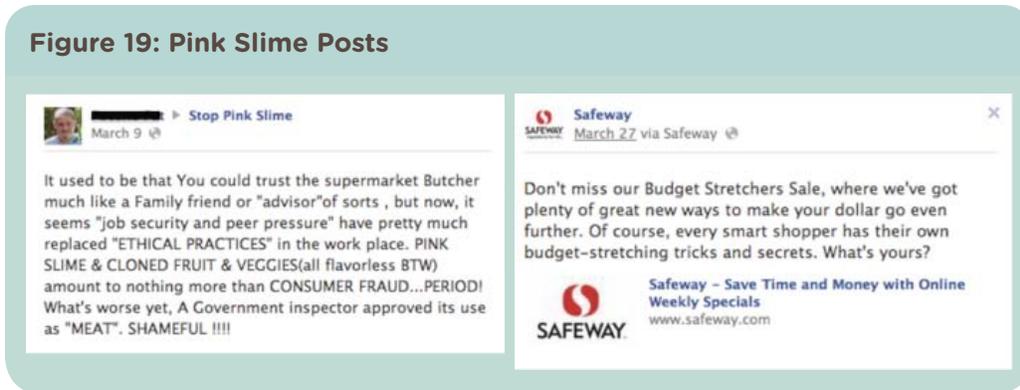
Figure 18: King Soopers



EXAMPLE 11: PINK SLIME

Grocers and fast-food purveyors had to act quickly in March of 2012 when the social web exploded with controversial news coverage about pink slime. Articles, posts, pictures and videos spread quickly, making users uncertain about what to eat and where to buy their meat. Some retailers like Safeway® were able to respond and provide incentives that would entice shoppers back to their meat departments and counter the rising prices of beef due to the removal of pink slime.

Figure 19: Pink Slime Posts



F. LISTEN AND RESPOND

Being able to effectively listen and communicate is critical to building strong relationships and connections—in the real world and in the social web. In the fast-paced social web it is imperative to know when to simply listen versus respond immediately.

Feedback from the expert panel interviewed for this study notes that it is important to continually listen as you engage. You can not only find opportunities to respond and build connections but also mend negative sentiments. Negative sentiments are inevitable, but experts indicate that it's important to listen fully and to know which ones to respond to and how. More specifics on this topic are outlined in Step 2 of this section.

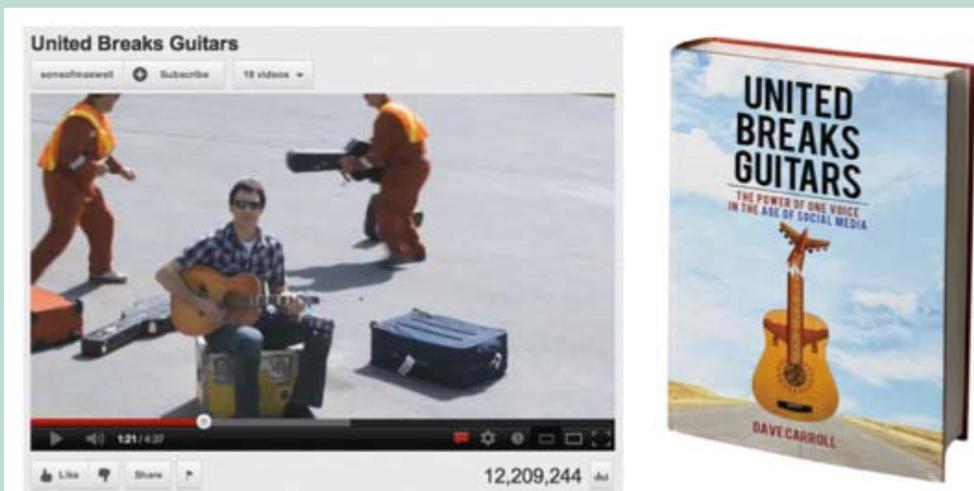
HOW-TO TIP: When it comes to handling negative content, the panel of experts interviewed for this study suggest responding to those with true issues or concerns vs. those who are simply venting.

EXAMPLE 12: UNITED AIRLINES®

The social web empowers consumers as never before when they encounter poor products, service or mere indifference. One of the most famous of these examples came courtesy of United Airlines.

In 2008, the airline dismissed complaints from an angry customer whose guitar had been broken as a checked baggage item. As a result, the man made a country song entitled “United Breaks Guitars” and posted it on YouTube®. The video has since reached over 12M people on YouTube, and, in 2011, he published his first book, *United Breaks Guitars: The Power of One Voice in the Age of Social Media*. Don't risk this kind of backlash by trying to sweep negative issues under the rug. Address necessary issues head on and be open with your customers. Today, customers have the ability to be widely heard, either negatively or positively.

Figure 20: United Example



STEP 2 Activate Your Social Role

With your platforms set up, your staff in place and knowledge of the rules of the road, it's time to activate your social role and engage with those in the social web. Successful activation requires appropriate tactical execution as well as strategic thinking that leverage knowledge you discovered in Section 1 about your current and prospective connections. It can be a lot to account for in a dynamic and changing space.

Even expert respondents acknowledge that “we’re still experimenting” and that “there aren’t many successful case studies because many brands and retailers are still figuring out what to do with the space.”²⁵

So, when in doubt, know that there are three simple truths, four types of execution and that it's ok to experiment and evolve.

Truths about Social Web Engagement²⁶

- For a fan base to talk, they need something to talk about.
- There is a need for conversations to go beyond company products and services. Without appealing to your shoppers' broader interests, a brand's online presence tends to be intrusive rather than engaging.
- You do not need a massive budget to succeed in the social web.

Tactical Executions

- Promotional Content
- Value Add/Educational Content
- Localization
- Customer Service

1. PROMOTIONAL CONTENT

What's it good for? Facebook, Twitter, Yelp®, Tumblr®

Just because you're on Facebook does not mean you should abandon traditional promotional activity. This is how shoppers are conditioned to engage with many businesses, and this type of engagement provides a direct tie to the storefront and transactional behavior. Therefore, a portion of your efforts should be placed on providing promotional content. Deals, specials and promotions are the main reasons users choose to interact with business in the social web.²⁷ Also, promotions often create a lot of buzz in the social web and can be a means to build your community of connections.

25 The Integer Group. (2012). Expert Interviews.

26 Bob Marshall. 5 Food Brands Building Social Buzz on a Budget. Retrieved from: <http://mashable.com/2012/04/20/food-brands-social-media/>

27 The Integer Group/iModerate. (2011, November 7). Social Networking and Brand Engagement Research

HOW-TO TIP: It is important to note that discounts are not value-add content or a way to build connections. Rather, they are a way to incentivize and start the conversation and relationship. To encourage connections to engage with you via promotions invite them to respond somehow. Or consider making the offer exclusive to a certain platform.

EXAMPLE 13: JCPENNEY®²⁸

JCPenney learned the hard way just how addicted shoppers are to deals. In a major repositioning of its marketing, the retailer did away with frequent coupons and promotional circulars and replaced them with “best priced Friday.” Shoppers did not react well. Same-store sales for the first quarter of 2012 plummeted 19%, and store traffic declined 10%. The weekend bargain-hunting coupon-wavers simply weren’t showing up anymore. JCP has since changed its marketing message to “the big deal starts today” to eliminate the assumption that Friday is the only day for deals. The retailer also plans to highlight new, discounted prices versus the prior message of everyday low prices.

EXAMPLE 14: AMEX® TWEETS

American Express® and Twitter have nailed social commerce with the “sync your way to savings” program. Shoppers are able to get cash back or discounts on everyday purchases by pairing their AMEX cards with their Twitter accounts. Shoppers simply tweet to re-advertise the promotional offers they have taken advantage of and the discount is automatically applied to their American Express cards. There is no need for coupons, printouts or promo codes. It’s as simple as sync, tweet and save.²⁹

Figure 21: American Express Example



28 Sandy Widlitz. (2012, May 16). Lessons for JCPenney: Consumers Are Addicted to Deals. Retrieved from: <http://www.cnbc.com/id/47440277>

29 Bruce Upbin. (2012, March 7). Amex and Twitter Nail Social Commerce. Retrieved from: <http://www.forbes.com/sites/bruceupbin/2012/03/07/amex-and-twitter-nail-social-commerce/>

TYPES OF PROMOTIONAL CONTENT

- Buy one, get one (BOGO)
- Sweepstakes
- Free gift with purchase
- Couponing
- Sampling
- Circulars
- Special in-store/online events
- Rebates/contests
- Sponsorships

2. VALUE-ADD CONTENT

What's it good for? Facebook, Twitter and Pinterest

You shouldn't run social media campaigns to simply acquire larger numbers of fans. Instead of reaching for numeric goals or quotas, you should use the unique traits of the social web to build connections. There are many ways to tap in to the lifestyles, values, hobbies and interests of your connections. Facebook, Twitter and Pinterest are great platforms for this style of content and make it easy to locate existing enthusiasts.

HOW-TO TIP: According to social media data expert Dan Zarrella, you're more likely to get better engagement out of your connections if you add more pictures, speak in first person and take a passionate (not neutral) stance on things you post.³⁰

Value-add content is important and effective. Integer's social media expert panel agrees and feels that engagement online should abide by the 80/20 rule: 80% of your content needs to add value to your readers and be things that matter to them, while, at most, 20% can be about your brand, products or services. Ryan Adams, an Internet consultant, once said:

"Some businesses only post sales pitches to their Facebook Fan Page. There is certainly room for sales on Facebook and social media marketing is a great medium for contests and giveaways to increase fan followings. However, you will have the best success if you combine industry news and developments as well. No fan wants to hear a sales pitch from you every day. Keep them interested with a well rounded social media marketing campaign."³¹

To that point, ensure that your content calendar is diverse and includes a variety of concise and engaging messages that can be leveraged on various platforms. Feedback from Integer's social media expert panel indicates that grocers are able to speak to a broad range of value-add content in the social web including recipes, health tips, holiday activities and community events. This can

30 Samantha Murphy. How to Get More Likes, Shares on Facebook. Retrieved from: http://mashable.com/2012/06/19/how-to-get-more-likes-shares-on-facebook-infographic/?WT.mc_id=en_top_stories&utm_campaign=Top%2BStories&utm_medium=email&utm_source=newsletter

31 Nicholas Scalice. (2012, March 24). Marketing with the 80/20 Rule. Message Posted: <http://fastblink.com/blog/2012/03/24/marketing-with-the-8020-rule/>

be beneficial or detrimental. If value-add content is not aligned with the grocer's social role, it can appear disjointed and inconsistent to connections. Ensure that all content ladders back to your vision and objectives.

EXAMPLE 15: SOUTHWEST AIRLINES®

Southwest Airlines brings its quirky personality and lots of imagery into its posts to engage shoppers.

Figure 22: Southwest Airlines Example



EXAMPLE 16: RITE AID®

Another way to build connections and usability is to create content that makes life easier for your connections. Rite Aid is one brand that has done this. Rite Aid has offered helpful household hints using items that can be purchased at its stores. Who would think to use WD-40® to remove crayon from a computer screen?

Figure 23: Rite Aid Example



Create content that makes life easier for your connections.

EXAMPLE 17: WHOLE FOODS

Pinterest is another platform where brands can showcase their value-add content. Whole Foods, the world's largest retailer of natural and organic foods, has tapped in to the power of Pinterest. The retailer features pictures of mouthwatering apple pies next to tips on how to make your garden grow.

Figure 24: Whole Foods Example



TYPES OF VALUE-ADD CONTENT:

- Live events (e.g., Q & A with a nutritionist live on Facebook)
- Tips or how-tos
- Photos (lots of them; visuals get the most response)
- Little-known facts or factoids
- Relevant and timely statistics
- Top 10 lists
- Guides to help educate
- News
- Polls/surveys
- Gift ideas
- Behind-the-scenes videos and photos
- Exclusive content
- Streaming music
- Song downloads/playlists

3. LOCALIZATION

What's it good for? Mobile, Facebook and Twitter

It's important to be where your customers are, and today, there are several resources that allow localized communication including mobile apps, local Facebook posts and/or pages, local Twitter feeds and geo-fencing.

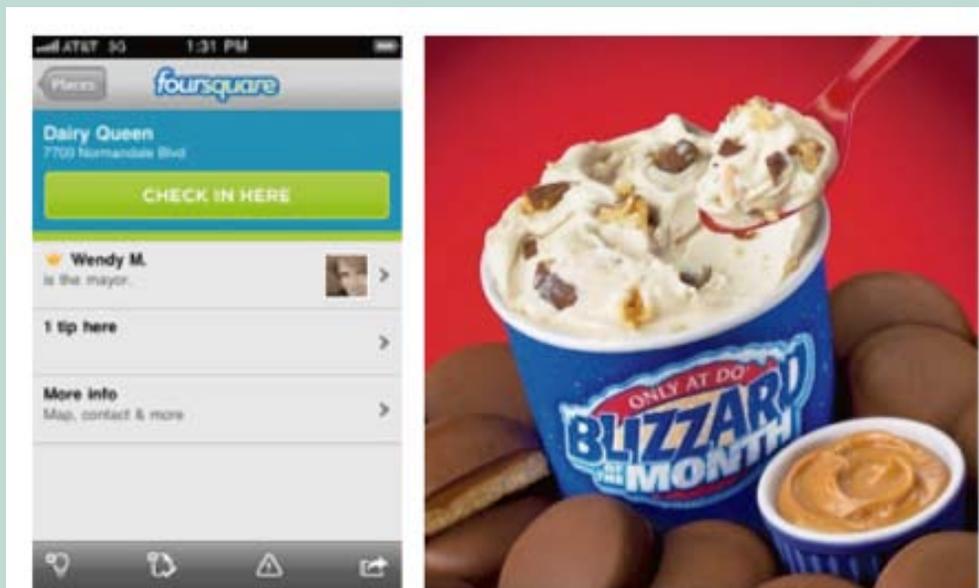
Mobile is an integral part of social networking activity. It acts as an accelerator for social behavior and certain apps can help you generate buzz and connect with shoppers at a local level. Businesses can leverage location-based apps like foursquare or MyWebGrocer® to notify shoppers of special offers and provide helpful content.

EXAMPLE 18: DAIRY QUEEN®

In 2012, Dairy Queen ran a foursquare contest that encouraged fans to check in at restaurants as they travelled around the country. Dairy Queen offered a prize for the most mobile fan and garnered the simultaneous benefit of highlighting how its fans are sweeping the U.S.

It is important to stay up on the capabilities of these apps to ensure that they are relevant and helpful to your connections. For example, foursquare launched a new version of their app this year after noticing that users are not checking in as often. In response, foursquare evolved to be more like Yelp, a social recommendation network. Foursquare reviewed the way the app worked to match users' desires and has made it possible for them to comment on locations and allow for more social interaction. This allows a new set of opportunities for foursquare in the geolocalization business.

Figure 25: Dairy Queen Example



Consider this: Being able to have shoppers check in to your store with their shopper loyalty card. This type of mobile activity would allow you to know who is entering the store so that you could provide them with the right push deals and ads that suit their needs.

EXAMPLE 19: MYWEBGROCER³²

MyWebGrocer's Facebook Circular mobile app provides a point of contact for grocery retailers to reach tech-savvy shoppers to share, socialize and promote their weekly circulars. The app allows shoppers to provide real-time feedback on weekly sales and create shopping lists that automatically link to a given retailer's website. Because shoppers are already engaging with their favorite brands via Facebook, retailers can now share weekly ad circulars with the millions of Americans who use Facebook each month.

It's important to point out that having a national vs. local Facebook page or Twitter feed is not an either/or proposition. Having a national page is often the hub where most shoppers flock to get the best information from the company. From there, it's often seen as a perk if a brand has a more customized page with local information pertinent to a specific store. This can be a great way for local shoppers to share deals and promotions with each other and connect with their community. Even though posts might not be as frequent, they're super-relevant to your shoppers.

Geo-fencing is a virtual perimeter in a real-world geographic area. When a shopper enters the designated zone (i.e., within a five-mile radius of your store) with their mobile phone, they are able to receive a generated offer or notification to entice them to come in to your store.

EXAMPLE 20: GEO-FENCING

Geo-fencing is part of a new technology rollout for Walmart. The Walmart mobile phone app can customize—down to the aisle-level—where the shopper is and allow them to be hooked into the store's inventory system in real time. The geo-fencing capability will actually take over a user's mobile app when they come into the store and provide a unique experience. It will enable shoppers to request customer-service help, which will be dispatched to their location in store. Also, users can choose to scan the bar codes of items they put in their carts and check out via their phones, skipping the registers altogether. Finally, they will have the ability to purchase items the store might be out of (a particular size of clothing, perhaps) and include them in their day's transaction with those items shipped directly to the users' home.

TYPES OF LOCALIZED CONTENT:

- Special events at your local store
- Localized couponing
- Way-finding in aisles

32 Morning News Beat. (2012, May 24). Economy Beat. Retrieved from: morningnewsbeat.com/News/News_Article_Detail_L_S.1as?A=39313&Date=2012-05-24

4. CUSTOMER SERVICE

What's it good for? Twitter, Facebook and Email

Customer service has evolved as a result of social media. Now people prefer to communicate via email, Facebook or Twitter instead of picking up the phone. They expect the instantaneous response these tools allow, and you can win an emotional return via fast customer service and service guarantees. You will be rewarded with your shopper's loyalty and brand evangelism.

Customer service centers aren't necessarily experiencing a decrease in call volume, but simply have more people talking to them overall because of social media channels. Businesses see this as a positive thing, because they are able to get more feedback from more shoppers while enhancing the customer service experience.³³ With the rapid speed of information sharing, it's never been easier to react to and impact customer sentiment in real time.

HOW-TO TIP: Invite connections to provide reviews and comments. In the words of one expert respondent, "If you are not going to consider reviews and feedback, then don't get involved [in the social web]."

Some things to consider when it comes to customer service include³³:

- **MONITORING:** customer service needs to always be "on" and respond to Facebook posts or Tweets. Use narrow listening tools like Hootsuite you set up in Section 2 to help you stay alert to chatter and respond appropriately.
- **MANPOWER:** ensure that you have the adequate amount of staff to provide real-time responses. Consider picking a group of customer service employees who already understand social media.
- **CONSISTENCY:** have all customer service employees trained under the same guidelines.³⁴ This way, similar standards are in place for all types of communication on- and offline.
- **RESPONSE:** establish guidelines for what merits a response, and ensure that responses are given within a predetermined time frame.

HOW-TO TIP: Encourage staff to respond to true issues rather than to customers who are simply venting. When they do engage, it is helpful to provide staff-response scenarios—ways to make responses personal vs. automated—as well as cheat sheets of answers to FAQs and nuances of how to engage on the various social media platforms.

33 The Integer Group. (2012). Expert Interviews.

34 Consult with Part 7 for information on developing social web policy and employee training.

- **POST REMOVAL:** set guidelines for when a post should be removed. Criticism and negative comments are expected, but SPAM or vulgar posts may be content you wish to remove.
- **CRISIS MANAGEMENT:** develop a crisis management and response framework. Beyond normal posts and negative comments, it is important to be prepared for how to use the social web in the event of a crisis.
- **ASSURANCE:** provide a guarantee to your customers and use all of your channels—Facebook, Twitter, texting and email—for customer service.

CONCLUSION

Armed with a solid plan and different ways to activate your presence in the social media space, you're ready to engage in a meaningful way with your shoppers online. Express your point of view and remember to stick with your brand voice across all social media platforms. Have the resources and diligence to respond in real time and keep the conversations going. This is an ongoing process; stick with it, and you will reap the rewards. As an organization, it will require a shift in mentality. A move from campaign-based thinking to capability-based thinking.

Up next, we will tackle the complex world of measuring activity in the social web. It is vital to have measurement tools in place to know what engagement strategies work and to set yourself up for success.

SECTION 4: ASSESS AND EVOLVE YOUR ROLE AND GOALS

HOW TO DEFINE AND MAINTAIN SUCCESS

OVERVIEW: Section 4 consists of three steps that will guide you through various frameworks that aim to assess social engagement and measure success.

STEP 1: Translate the Data: revisits the basic measures used in the social web and explains how to derive greater insight behind basic behavior metrics.

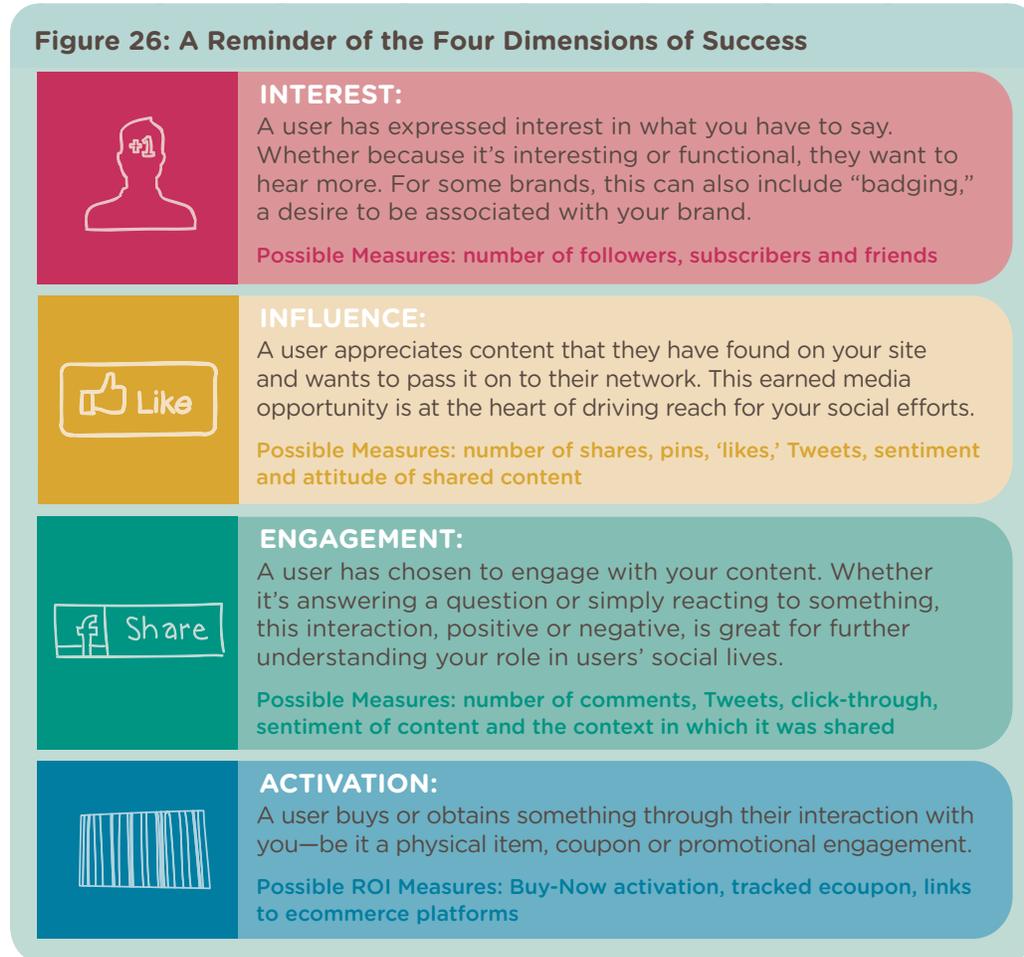
STEP 2: The How of Measuring: explains three frameworks for measuring success that are rooted in objectives.

STEP 3: Evolve Social Efforts: reminds us that we must continually assess our actions and their effects to keep pace with the social web.

STEP 1 Translate the Data

As discussed in Section 1, different social metrics can be tied to basic user behaviors and dimensions of success, which present ways to decipher activity across multiple networks.

Figure 26: A Reminder of the Four Dimensions of Success



To translate these direct measures into more meaningful data, look at the underlying user intent. Look to translate the meaning of social web actions and connect them to objectives. Then work through the connections and begin to understand potential relationships between the end goals and the desired behaviors.

HOW-TO TIP: Establish a structure to understand user intent behind online actions. It will prove helpful as new platforms emerge.

STEP 2 The How of Measuring

The social web measurement conundrum has given rise to a number of new measurements that are more complicated and require looking at new variables beyond traditional return on investment. As one expert panelist stated, “ROI (return on investment) is not always the end goal [in the social web].” Further, because the social web can be used as a branding or promotional tool, success can be measured in terms of either short-term activity or long-term trends. And, because it exists in a digital space, with time and investment, data can be used to connect shoppers and activity.

To illustrate a breadth of approaches and techniques to determine success, we will look at three lead models:

SOCIAL ENGAGEMENT TO CREATE IMMEDIATE ACTION

- Short-term campaigns built to directly engage social connections for the purposes of driving immediate action.

SOCIAL ENGAGEMENT TO SUPPORT A BRAND

- Continuous social presence in support of a brand that includes a mix of short-term engagements and a long-term strategy.

SOCIAL ENGAGEMENT TO BUILD AND MEASURE ONE-ON-ONE RELATIONSHIPS WITH USERS

- From a measurement standpoint, this is the most complex approach, connecting data across online and offline actions, but it also yields the most specific results.

Choosing a model is the first step in evaluating social efforts. While seemingly fundamental, this distinction is important in defining success and the proper approach required. As one expert respondent stated:

“You can measure a lot on the social web. It’s important to measure with purpose.”

HOW-TO TIP: Always start by asking yourself: Are we trying to understand the impact of a short-term program or the collective influence our social efforts have had over a period of time?

1. SOCIAL ENGAGEMENT TO CREATE IMMEDIATE ACTION

This model is focused on short-term campaigns built to directly engage social connections for the purposes of driving immediate action.

These include:

- Efforts to grow connections
- Engagement via participation in promotions
- Drives directly to retail

Measurement of these efforts is easier because the relationship between action and reaction is more direct, and mechanics can often be built in to directly track progress.

For example:

- If your objective is to increase interest, you can use a short-term hook (20% off, exclusive shopping hours etc.) to drive users to your social page and entice them to 'like,' follow etc., with the measurement of increases and velocity of increases in 'likes,' followers etc. being your measurement.

OR

- You could provide additional rewards program points to users who share relevant content with their networks to increase the influence of your social presence, with the rate of increased sharing being your measurement.

These immediate action-driving activities are both self-contained measurable experiences for users and set a tone for the type of social business you are, which adds to your overall brand presence.

Figure 27: Common Tactics Focused on Driving Short-Term Success

MEASURABLE TACTICS	ROLE
'Like'/Follow for access to added value (coupon, exclusive sales, free gift etc.)	Grows connections base; builds interest
Share retailer content for added value	Builds influence behaviors and creates earned media
Share user-generated content for added value or a chance to win	Prompts interaction from connections
Share feedback or ideas for a chance to win	Prompts interaction from connections

In the instances of these short-term programs, success should be measured very directly between the role of the social effort and the outcome in relation to that role.

2. SOCIAL ENGAGEMENT TO SUPPORT A BRAND

This model is based on a continuous social presence in support of a brand that includes a mix of short-term engagements and a long-term strategy. This is a hard-to-grasp measurement that marketers struggle with at the end of each year when they look at what they spent and what they think they have gained. The difficulty with measurement at this macro level is connecting the many dots that will vary by how each marketer has chosen to approach the social web. However, this is where it is critical to return to the objectives and roles that were laid out in Section 1 of this document. From these basic objectives, we can recommend a couple of approaches that will help in defining success for your social programs.



HOW-TO TIP: All measurement of long-term success needs to be viewed both as a picture in time as well as an ongoing trend.

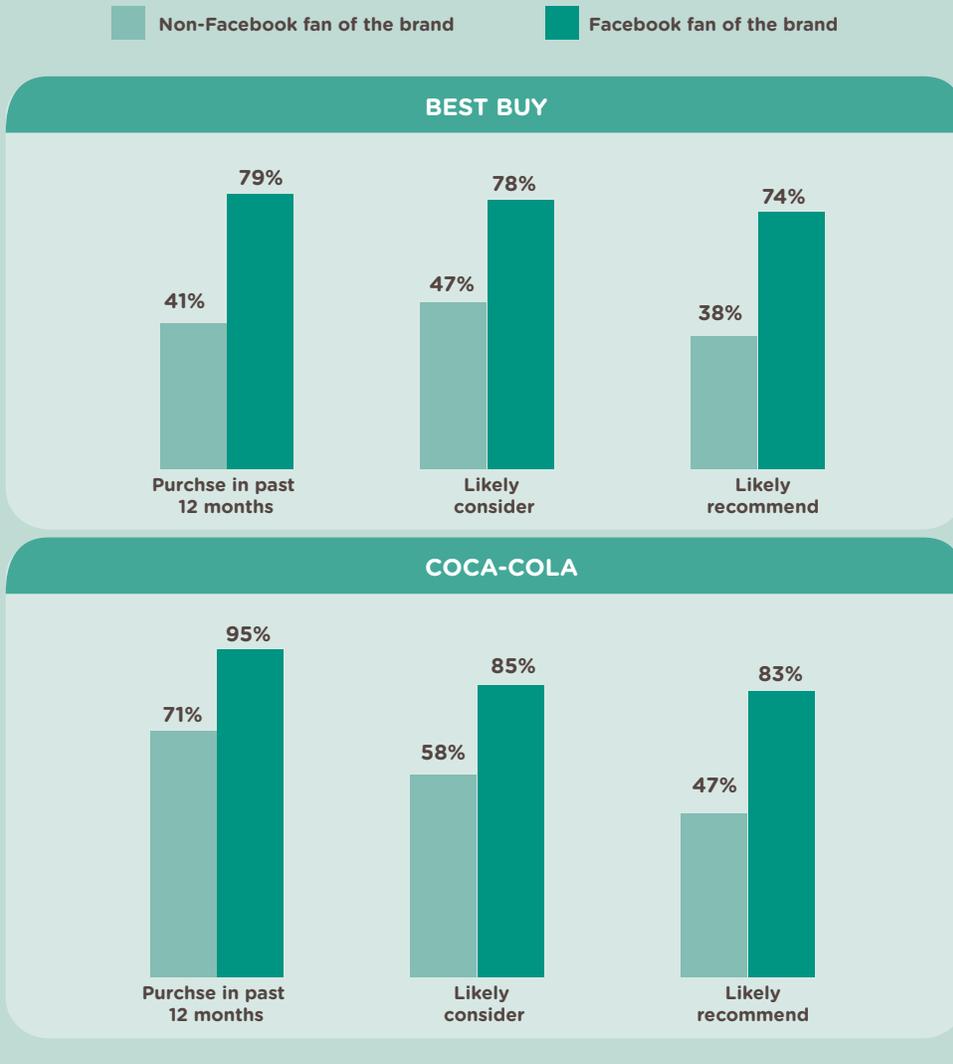
IF YOUR OBJECTIVE IS SALES-ORIENTED

Often, marketers look to connect social efforts to sales through some direct correlation. With this mind-set, the task can often seem daunting, if not impossible, because there are so many variables. While market-mix modeling has gotten incredibly advanced, social efforts have yet to find their place in most models. However, there is another way if the goal is really to answer the question: Are my social efforts changing my shoppers' behaviors, increasing their basket size or trip frequency?

A recent report published by Forrester is potentially the most straightforward way to evaluate long-term efforts in the social web for retailers. Effectively, they surveyed shoppers and quantified the differences in behaviors for those who are social connections of retailers and those who are not. This can answer a few simple questions that we believe translate into "real" success measures (see the following figure).

Figure 29: Sales-Oriented Objective Measurement³⁵

Forrester's shopper survey demonstrated that the social web could affect sales. Shoppers who were connected to the business on the social web were more likely to buy the business' product and recommend it to others.



To build on this Forrester study with greater specificity, businesses could reach out and survey shoppers through their loyalty programs. An email campaign to recruit program members or a pop-up on the store's website in member areas can potentially allow for a business to marry shopper data with their social behaviors.

By completing the following exercise, you can better understand questions like: Are my social connections spending more in my stores than the average shopper? Are my social connections visiting my stores more often? Are my social connections more likely to recommend my store to friends?

35 Forrester. (April 9, 2012). The Facebook Factor.

Exercise 13: Sales-Oriented Measurement

Using the following questions, survey your shoppers to help determine the effects of the social web on shopping habits:

- How many times have you visited the store in the past 30 days?
- How much have you spent in the store in the past 30 days?
- Would you recommend the store to friends?
- Do you follow the store on any social networks?
- Have you made any purchases in the store as a direct result of information you learned on social networks?

IF YOUR OBJECTIVE IS CUSTOMER-SERVICE ORIENTED

Businesses sometimes assume that using the social web for customer-service purposes will create efficiencies and streamline processes. However, given the highly visible nature of the social web, processes need to be even tighter, and training is even more important. There are examples of businesses handling customer service both poorly and exceptionally online. Good social web customer service can help you gain praise throughout the social web.

You need to think a little differently in terms of how you evaluate customer service via the social web. Consider the current state of customer service on the social web and the impact that the social web can have on customer relations. Use the following set of questions to understand how to measure customer service on the social web.

Exercise 14: Customer-Service Measurements

First, assess the customer-service situation. Your shoppers might be more likely to engage via the social web than by phone because it is quick and easy. This could open up new opportunities to service customers and improve relations.

- What is the number of interactions that your company is having with customers via the social web?
- Are there more or less than before?
- Are they more positive or negative in nature?
- Do your customer-service department and personnel feel more or less able to handle interactions?

Second, understand the impact of customer service via the social web. This should be viewed two ways: first, on an individual basis and then, on a broad customer-base basis.

INDIVIDUAL CUSTOMER BASIS: SOLICIT FEEDBACK

- A benefit to engaging with customers online is that simple survey mechanisms can be put in place to gather data. After a social customer-service interaction, a simple survey about the experience can provide valuable feedback on topics such as your service platform, your effectiveness in handling queries and overall satisfaction with your company.

BROAD BASIS: TRACK SENTIMENT

- As previously mentioned, the impact of customer service via the social web can be amplified both positively and negatively because it's a public platform. Interactions can be shared quickly and easily, which can lead to viral effects. This is where tracking sentiment across the social web as well as the drivers behind changes in sentiment can lead to valuable insight.

In the end, using the social web as a tool for customer service needs to be approached with the same rigor and discipline as any other marketing effort. Actually, due to the fact that customer service can often relate to sensitive issues and/or customer complaints, handling these in a public forum might require even closer attention and consideration.

IF YOUR OBJECTIVE IS MARKETING-ORIENTED

Using a traditional metric from the paid media world, share of voice can be a straightforward way to understand how your social efforts are working. The number of mentions your store brand is getting compared to competitors or the market as a whole is a reflection of the amount of attention your brand is garnering in the social web.

The formula is simple:

$$\text{Share of Voice Formula} = \frac{\text{\# OF BRAND MENTIONS}}{\text{(TOTAL MENTIONS OF YOUR COMPETITIVE SET)}}$$

This metric can be used for evaluating a few different data sets you might already have to provide a relative measure of success.

- Share of voice in social versus Share of Market based on sales or trips to understand if your social presence is garnering “fair share” given your position in the marketplace.
- Share of voice across different social channels. Is your Twitter SOV higher than your Facebook SOV? How are your efforts in different channels paying off in terms of generating conversations about your stores?

IF YOUR OBJECTIVE IS BRAND-BUILDING ORIENTED

Now that behaviors have been defined in terms of interpreting the direct measures of the social web, we can begin interpreting a broader meaning for how shifts in these measures can impact more tangible business measures.

A first step in understanding the impact of social efforts is to calculate the percent of your shoppers with whom you are building relationships. While activity in the social web isn't meant to simply stop at your social connections, knowing the size of your connections in relation to the size of your shopper base can give a sense of the potential impact your activities could have. The formula is:

$$\text{Reach of Your Social Connections} = \frac{\text{CONNECTIONS}}{\text{DAILY SHOPPERS}}$$

The next part of the equation requires looking at the social channels and understanding the relationship between those who are interested in your brand and those who are influenced by your brand. While a brand might have 1 million followers on Facebook, if only six of them tend to ‘like’ or share content that the brand posts, the actual influence of the brand is relatively small. By this standard, the ratio of interest to influence is relatively low. The formula is:

$$\text{Engagement Level of Your Social Connections} = \frac{\text{INFLUENCED}}{\text{CONNECTIONS}}$$

After understanding the engagement level, you must then look at the type of interactions that are happening around your social web. Are people following ‘liking’ you only so that they can complain or are they actually ambassadors of your brand? This is where we look at the positive or negative sentiment of those conversations going on in your social web. The formula is:

$$\text{Relationship With Social Connections} = \text{INTERACTIONS} \times \text{SENTIMENT}$$

Social relationships offer long-term support and drive brand affinity. Because of the positive relationships shoppers have had or heard about via the social web, they are more or less inclined to shop in your store. In the long-term view of social media, one can both add up the success or failure of short-term programs as well as track whether the interest, influence and interaction measures can be synthesized and correlated to overall brand affinity. The formula is:

$$\text{Affinity} = (\text{CONNECTIONS} \div \text{DAILY SHOPPERS})(\text{INFLUENCED} \div \text{CONNECTIONS})(\text{INTERACTIONS} \times \text{SENTIMENT})$$

Exercise 15: Relationship With Social Connections

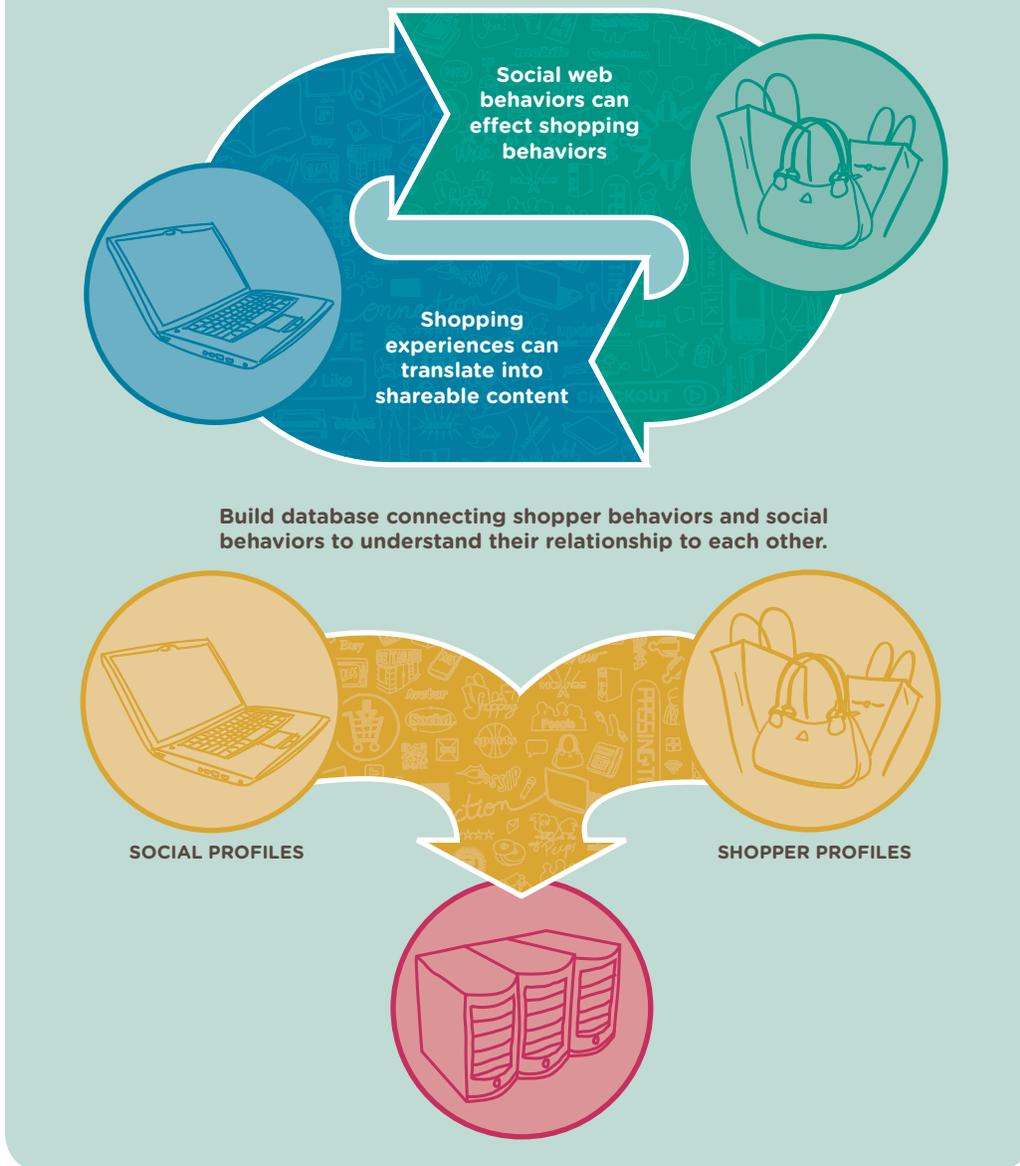
- How many shoppers enter your brick-and-mortar stores daily?
- How many social connections do you have?
- How many of your connections were influenced by your social activity in the past 30 days?
- How many times have your connections interacted in the past 30 days?
- How many of the interactions are positive versus negative?

While the formula above doesn't really calculate a success metric, it's meant to help retailers understand some of the critical relationships of different data they might have. Also, it translates those numbers into some (potentially) more business-friendly language that might be more readily understandable by internal stakeholders.

3. BUILDING AND MEASURING 1:1 RELATIONSHIPS IN THE SOCIAL WEB

The most direct and data-driven approach to measure social efforts is connecting social profiles to shopper profiles via reward programs or similar shopper data. Connecting these two profiles can allow retailers to look at their connections and related data in a similar fashion to how they view and analyze shopper data. By connecting online and offline behaviors, you begin to understand the impact of social efforts on sales and you can begin to tailor your social efforts based directly on the shopping behaviors of their connections.

Figure 30: Relationships and the Social Web



To start, a retailer can invite shoppers to connect their social profiles to a reward program or shopper card account. Shoppers can be enticed by special social deals as an incentive to connect their accounts. Once the link can be made between social profiles and shopper profiles, retailers will better understand their shoppers, the impact of their efforts and how to optimize their social efforts based on actual purchase data.

HOW-TO TIP: Connecting shopper and social data will yield so much desired behavioral data that you could drown in it. Maintain a focus on your objectives, and create some structure for the data so it doesn't overwhelm.

Potential Learning Areas

- **THE "SOCIAL BASKET"**—What are your connections buying? Does a Facebook basket look different than a Twitter basket?
- **CROSS-CHANNEL BEHAVIOR**—With what frequency are shoppers visiting social sites and social users shopping the store? Is there a correlation between connections interacting in the social web and trip behavior?
- **SOCIAL RESPONSIVENESS**—Are SKUs promoted in social content being purchased more often by connections? Are connections participating in promotions more often than other shoppers?

STEP 3 Evolve Social Efforts

The most critical element for measuring efforts in the social web is evolution. As discussed at the start of this section, the very nature of the social web is organic. It will not stand still; how shoppers view it and use it will continue to change. Because this is a technology-driven environment, new tools will develop constantly. As a result, measurement needs to be seen both as a tool for evaluating success and as a device for constant calibration.

Throughout this section, much attention is paid to translating data from the social web to basic shopper behaviors. This practice will serve retailers well as a means to take a constantly evolving environment and decipher what shoppers are really doing when they take a social action.

CONCLUSION

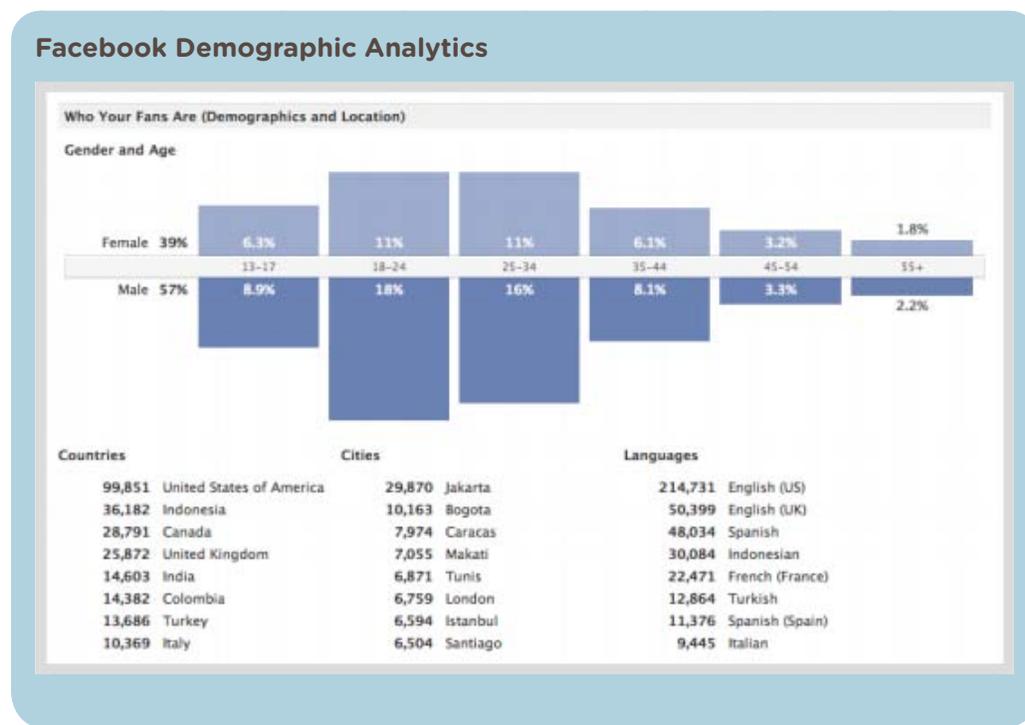
Measurement is the last of our sections in this paper. Although relatively complex, it is important for retailers to have measurement tools in place to know what is working and to provide an input into the evolution of your social web strategy.

APPENDIX

Item 1: Facebook Demographic Analytics³⁶

Through Facebook's Insights page, you can examine the demographic composition of your fans (those who have 'liked' your page) as well as any Facebook user who has seen content from your page.

- The Fans Tab on Facebook breaks down your Facebook fans by gender, age, location and language. You can examine composition over various time frames.
- The Reach Tab allows you to view the same breakdowns, but it represents the population that has seen any of your page's content in the past seven days.



Item 2: Facebook Connections Analytics³⁵

Facebook monitors many dimensions of connections (and their fluctuations over time) including:

- Total 'Likes': number of 'likes' (Friends and Fans)

36 Facebook. Facebook Page Insights Product Guide for Facebook Page Owners.

- Friends of Fans: the number of unique people who are friends with your friends (essentially, the potential reach of your connections)
- Weekly Total Reach: the number of unique people who have seen any content from your page
- People Talking About Your Brand: the number of unique people who have created a story about your brand (this includes ‘likes,’ comments, shares, event responses, check-ins, tags and mentions)

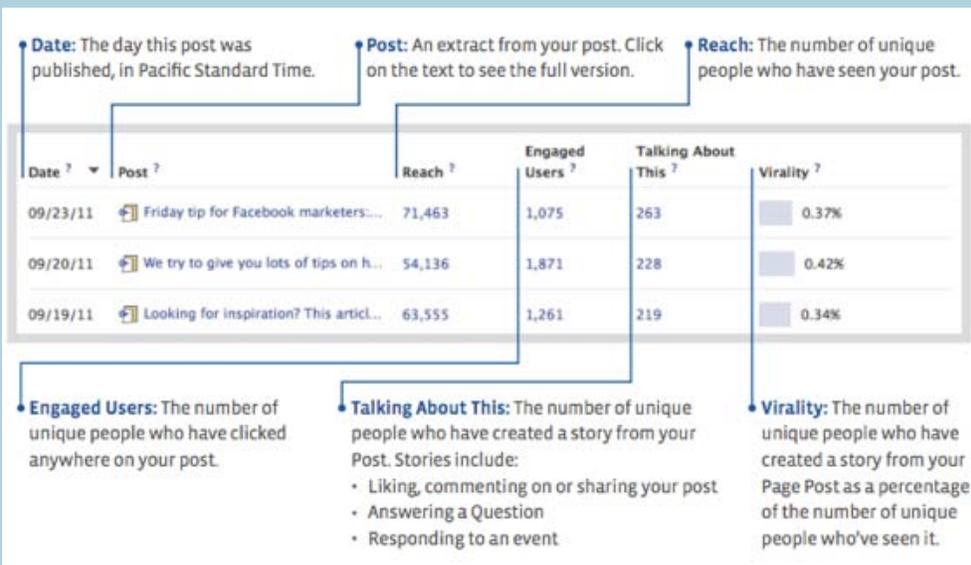
Facebook Connections Analytics



Item 3: Facebook Engagement Analytics³⁷

Facebook allows you to examine engagement beyond ‘likes,’ shares and comments including “virality,” or the reach of the post. However, it is important to read the content that is generated to truly understand your connections and successful post content, media and more.

Facebook Engagement Analytics



37 Facebook. Facebook Page Insights Product Guide for Facebook Page Owners.

Item 4: How to Search for Your Brand on Social Platforms

REVIEW YOUR FACEBOOK WALL HISTORY

- All content in which you were tagged should appear on your wall, cataloged by date. By simply viewing your profile page, you can see all your posts as well as comments and posts from others.

SEARCH TWEETS BASED ON KEYWORD OR HASHTAG (#)

- At the top right of your Twitter home page (or within the #Discover Tab), there is a search bar. Type in the term (keyword or hashtag) you wish to find, and it will return tweets, photos and videos in which that term was used as well as list the top people tweeting about it. Within the #Discover tab there is also the option to search by category and view trends based on your location and who you follow.

EXAMINE YOUTUBE VIDEOS

- In addition to the search bar at the top, you can discover content by using tabs listed on the left-hand side of the homepage including Social, Popular etc. It will allow you to see what your connections are viewing, what is trending overall and more.

EXAMINE PINTEREST BOARDS

- There is a search bar on the site. It will present, pins, boards and people who are active regarding the keyword.

Item 5: Identify Your Learning Plan

DEMOGRAPHIC PROFILE OF SOCIAL CONNECTIONS

- How old are your social connections?
- What is the male/female breakdown?
- What is the average household income?
- Where do they live?

SOCIAL, CONSUMER AND SHOPPER MIND-SET

- What are their primary motivations in the social web? As a consumer? As a shopper?
- What are their interests in life vs. online?
- What needs do they fulfill online vs. in store?

SOCIAL WEB ACTIVITY

- Where are they active in the social web?
- How often are they online or active?
- At what time of day or week are they most active?
- How do they like to access the social web?
- What activities do they enjoy the most? The least? Why?

SHOPPING ACTIVITY

- Are they the primary shoppers in their households?
- Whom do they buy goods for?
- How do they use the social web when it comes to shopping (e.g., build lists, download coupons, make purchases etc.)?
- How much do they spend online?
- What social web elements influence their purchase and/or where they shop?

ENGAGEMENT DRIVERS AND ACTIVITY WITH YOUR BUSINESS

- What motivates them to engage with businesses online?
- Do they engage with you online or in the social web? In what ways? What motivates this engagement?
- What do they like/dislike about engaging with businesses in the social web?
- What do they expect from engaging with a business online?

AUDIENCE COMPARISONS

- How do answers differ between those who have a strictly in-store relationship with your business vs. those who are part of your online community?
- How do answers differ between those who engage with your business online vs. those who observe your business activity online?

TRENDS AND EVOLUTIONS

- How have their answers evolved over time?
- How do you think their answers will change a year from now?

Item 6: Questions to Consider When Evaluating Listening Vendors³⁸

THEIR VALUE VS. THEIR CAPABILITIES

- Beyond functionalities, what value can they offer your business that will help you achieve your goals and objectives?
- Can they offer consulting services for areas like question phrasing?

THEIR ANALYSIS METHODS AND SERVICES

- Do they have people or computers running the analysis?
- How can they slice data? Do they have the capabilities to view analysis based on gender? Location? Psychographics?
- How do they gauge sentiment? What scale do they use? (Sentiment is typically gauged based on a polar scale of positive or negative. Some measure positive, negative and neutral.)
- Can they offer sentiment analysis beyond polarity? Can they classify content beyond positive and negative?

THEIR DATA FEEDS

- Where do they get their data? (Most vendors collect data from blogs, forums, social networks and ratings and review sites.)
- Do their data sources align with where you think your shoppers are active?
- How much of the social web does the data tap in to?
- How far back does the data set reach?

THEIR REPORTING TOOLS

- How do they deliver data? (PDF, CSV, XLS, PPT etc.)
- How flexible is their output?
- Can you customize reports as needed?
- Do they provide dashboard options?

THEIR PROCESS TIME

- How long does it take to set up the process?
- How long does in-field research take to meet your objectives?

THEIR SCALABILITY

- Can you leverage their services in the future for other purposes?

³⁸ The Integer Group. (2012). Expert Interviews.

THEIR PRICE

- What are their pricing options? (Annual fee, per initiative?)
- Can you get scalable discounts if you want to use the service for various banners?

Item 7: Social Web Platform Overview^{39,40,41}

Social Web Platform Overview		Facebook	Twitter	Pinterest
How the Platform Is Used		<ul style="list-style-type: none"> • Users connect with those with whom they share strong or weak ties • Users communicate via updates, messages and the sharing of videos and photos 	<ul style="list-style-type: none"> • Users post status-like updates • Tweets must be 140 characters or less • Typically, news updates and macro information 	<ul style="list-style-type: none"> • Users save, categorize and share images and videos of their favorite things online • Top interests are crafts, gifts, hobbies/interests, interior design and fashion
Size and Demographics		<ul style="list-style-type: none"> • 1 billion active users • 57% female/43% male 	<ul style="list-style-type: none"> • 517 million active users • 59% female /41% male 	<ul style="list-style-type: none"> • 21 million unique visitors • 82% female
Devices and Technology		<ul style="list-style-type: none"> • Available on desktop computer web and mobile web • Has mobile and tablet apps 	<ul style="list-style-type: none"> • 54% of tweeters are on mobile devices • Mobile by nature, with restrictions on character count • Available on desktop computer web and mobile web • Has mobile and tablet apps 	<ul style="list-style-type: none"> • Available on desktop computer web and mobile web • Has mobile app
What Differentiates It?		<ul style="list-style-type: none"> • Largest social platform • Scalability • Brand-specific accounts and products 	<ul style="list-style-type: none"> • Very fast-paced • Mobile by nature • Fewer brand restrictions • Brand-specific accounts and products 	<ul style="list-style-type: none"> • A captive audience • On average, people spend over 16 minutes per visit (that's more than Twitter or Facebook)

39 Ingrid Lunden. (2012, July 30). Analyst: Twitter Passed 500M Users In June 2012, 140M Of Them In US; Jakarta 'Biggest Tweeting' City. Retrieved from: <http://techcrunch.com/2012/07/30/analyst-twitter-passed-500m-users-in-june-2012-140m-of-them-in-us-jakarta-biggest-tweeting-city/>

40 Alissa Skelton. (2012, March 9). Social Media Demographics. Message Posted: <http://mashable.com/2012/03/09/social-media-demographics/>

41 Facebook. (2012, October). Retrieved from: <http://newsroom.fb.com/content/default.aspx?NewsAreald=22>

ABOUT THE AUTHORS

About the Coca-Cola Retailing Research Council of North America

The Coca-Cola Retailing Research Council of North America (www.cccrc.org) conducts studies on issues that help retailers respond to the changing marketplace. The unique value of these studies rests with the fact that retailers define the objective and the scope of each project and “own” the process through the release of the study and dissemination to the broader retail community.

Members of the eighth Coca-Cola Retailing Research Council of North America:

- David Ball, Ball's Food Stores Inc.
- Jonathan Berger, The Consumer Goods Forum
- Chris Coborn, Coborn's Inc.
- Mike Donnelly, The Kroger Co.
- Randy Edeker, Hy-Vee, Inc.
- Cathy Green Burns, Food Lion LLC
- Jerry Golub, Price Chopper Supermarkets
- Mark Irby, Publix Super Markets
- Jay Lawrence, MAL Enterprises, Inc.
- John Lucot, Giant Eagle, Inc.
- Tim Mason, Tesco U.S.
- Jason Potter, Sobeys
- Leslie Sarasin, Food Marketing Institute
- Carlos Smith, Bodega Latina Corporation
- J.K. Symancyk, Meijer Inc.
- Todd Vasos, Dollar General Corporation
- Lauri Youngquist, Knowlan's Super Markets, Inc.

About The Integer Group—@IntegerGroup

The Integer Group (www.integer.com) is one of the world's largest retail, promotional and shopper marketing agencies and a key member of the TBWA\ Marketing Services portfolio. The Integer Group resides At the Intersection of Branding and Selling® and creates strategic marketing solutions for clients in categories that include beverage, packaged goods, telecommunications, retail, fast food, home and shelter and power sports. Join Integer in a conversation on shopping culture and brand strategy at www.shopperculture.com or on Twitter @shopperculture.

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