

What You Need to Know About Social Media for Marketing

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IT leaders need to manage organizational expectations based on their ability to support five social media use cases. When identifying resource and technology options, they should work with the marketing department to determine the most critical capabilities and plan to deploy one or more strategies.

Overview

Key Findings

- Social monitoring is still the most popular use case of social for CRM; however, it is evolving into social engagement.
- Advanced social analytics and campaign management have been prominent areas of new investment.
- The social marketing manager, brand manager and campaign manager play the most critical roles in executing on social use cases for marketing.
- Most companies initiate social marketing as a separate silo, and organizations are struggling to create a social strategy for marketing that complements their broader marketing strategies.

Recommendations

- Work with the marketing department to determine which capabilities are most critical when identifying resource and technology options for your organization.
- Design a plan for implementing one or more of the strategies described below, taking into account resource or technology needs, as well as the resulting investments that need to be made in staffing and/or tools.
- Ensure that you can create links between the social marketing metrics tracked as part of your program to develop marketing or business objectives.

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Analysis

Introduction

To more granularly define the social space and its complementary focus on core marketing, this research will delve into five cases of social media for marketing, commonly cited by our clients, along with the organizational roles, processes and technologies that complement them. IT leaders must manage organizational ideals and expectations based on their ability to support the five use cases of social media, which are listed here in their order of popularity:

- Social media engagement for marketing
- Advanced social analytics for marketing
- Social campaign management
- Market research, new product introductions and test launches
- Idea management

For each use case, IT leaders must recognize that marketers want to use information from similar sources. The 12 most popular social networking sources for marketers in 2013 are shown in Table 1.

Table 1. Social Networking Sources

Social Media Source	Primary Geographies Addressed
Facebook	Global
Google+	Global
YouTube	Global
Twitter	Global
Sina Weibo	China
Qzone	China
Tencent Weibo	China
Youku	China
Mixi	Japan
Cyworld	South Korea

Company Communities and Blogs	Global
Industry Communities and Blogs	Global

Source: Gartner (October 2013)

Of the current investments being made in the social marketing space, advanced social media analytics for marketing and social campaign management have been the largest investments. These areas are often invested in without the knowledge of the IT organization. For IT to play a larger role in marketing's use of social media, IT leaders must understand all five uses of social media for marketing and the people, processes and technologies that support them.

Social Media Engagement for Marketing

Social media engagement for marketing is defined as organizations using social media monitoring and response tools to promote, develop, strengthen or defend a product, service or brand. It is an evolution of social media monitoring to include engaging with fans, responding to content and understanding what works to broaden the number of brand connections. Social media engagement for marketing is popular across multiple industries, because there is theoretically no cost to engage with constituents on social media. However, mature social organizations often invest in the people and technology required to sustain a cohesive brand voice on social media. Companies in the retail, consumer goods and services industries are heavy investors.

Businesses across all industries with only a few exceptions, such as life sciences, are commonly seen engaging with constituents on social media for marketing purposes. AAA, Major League Baseball and the Queensland Police Service are just three of the estimated 30% of international companies engaged in social media for marketing.

People

IT professionals in support of marketing will need to connect with the following marketers to realize success in social media engagement for marketing:

- **Marketing communications managers** will provide relevant messaging and content to social marketing managers who have been charged with conducting frontline engagement.
- **Social marketing managers** will look to social media engagement to create touchpoints with prospects and customers, deepening relationships with the brand en route to sales or business growth.
- **Crisis communications specialists** will leverage social media engagement to identify and defuse potential points of conflict or negative sentiment with the brand.

Certain IT professionals will need to provide support for social media engagement for marketing:

- **CRM managers** will need to ensure that the social customer engagement touchpoint does not operate in isolation and conversation histories can be pulled into the legacy CRM applications.
- **Data quality leaders** will be responsible for cleansing somewhat unstructured social data so that it can be input into legacy application formats.

Process

- **Identify a means for aggregating content sources:** This might mean working directly with social network APIs or using a data provider such as Gnip or DataSift. This can more simply be accomplished by investing in social media applications.
- **Consider the need for review cycles:** Not all social media posts will need to be reviewed before they're published; after all, timing is everything when it comes to social media engagement. However, consider the regulatory need or marketing's educational need to review certain posts at an administrator level before they are published.
- **Consolidate constituent conversation histories:** Marketers want to identify key influencers and track their conversations with the organization. Look for conversation threading functionality and the ability to identify influencer scores in

developing or investing in a social media engagement application for marketing.

Technology

Although technologies supporting social media engagement for marketing vary in complexity, at their core, these technologies require:

- **A central location for aggregating multiple social media feeds** that enables social marketing managers to see all important information at once, versus jumping from site to site.
- **A central location for responding to multiple social media feeds** that enables social marketing managers to work off a single application, rather than multiple applications.
- **Workflow for escalation** to subject matter experts, PR leaders, sales, customer service, HR or even legal. Marketing may not have answers to all of the posts on social media sites.
- **User permissions** so that new users, geospecific users or product-specific users have the appropriately limited access to owned social media accounts.

Sample vendors include salesforce.com, Hootsuite, Visible Technologies Spradfast and Sprinklr.

Advanced Social Analytics for Marketing

Advanced social analytics for marketing enables marketers to identify influencers and trends, profile customers, evaluate content and campaigns, and classify social content by subject/topic, sentiment and intent for marketing objectives. This is one of the hottest areas of social for CRM in 2013.

Marketers are using advanced social analytics for three primary reasons: market research, campaign analytics and influencer analysis. Consumer goods, retail, services, high-tech and automotive companies have been early adopters; however, heavily regulated industries such as life sciences and financial services are also investing in advanced social analytics strategies for marketing. Companies with advanced social analytics programs for marketing include Microsoft, Nike and Taco Bell.

People

IT professionals in support of marketing will need to connect with the following marketers to realize success in advanced social analytics for marketing:

- **Product marketing managers** will use advanced social analytics to determine the success of their social marketing campaigns.
- **Market researchers** will use advanced social analytics to supplement traditional and community-style market research techniques to gain immediate insights.

IT professionals themselves will also need to take a proactive role:

- **Data scientists** will work with advanced social analytics for historic trend analysis and accuracy, as compared with traditional marketing analytics data.
- **Application developers** may need to be introduced to social media analytics projects if an organization decides to build a custom social analytics application, rather than buy it.

Process

- **Identify your social analytics use case for marketing:** Decide whether you're after campaign analysis, influencer analysis, market research or some other purpose — be specific.
- **Determine your sources:** You will be likely to need to analyze social networks other than Facebook and Twitter. Work with the marketing organization to determine your most important sources, based on your audience.
- **Pull in the data:** This is likely to require an investment in a social analytics application or, at a minimum, a business intelligence (BI) platform that is compatible with social data or access to APIs and pulls in data from social network sources, such as a Gnip or Datasift.
- **Analyze social data as one component of your overall marketing analytics strategy:** Compare social analysis with traditional analysis and use it as a key input in decision making, rather than the only input for decision making.

Technology

Social analytics applications for marketing must be able to:

- **Aggregate data from multiple sources** such as Facebook, Twitter, communities, review sites, forums, blogs and traditional Web search so that information can be filtered and compared by source and demographic.
- **Analyze social data** via keyword analysis or natural-language processing (NLP) to do sentiment, topic, trend, influencer and geospatial analysis.
- **Report on and visualize the data** for consumption by upper management and lines of business.
- **Send alerts and notifications** when topics accelerate or decelerate in volume, indicating opportunities or crises.

Sample vendors include Brandwatch, Crimson Hexagon, IBM, Socialbakers and Synthesio.

Social Campaign Management

Social campaign management offers marketers the capability to track, monitor and use social networks and the strength of relationships within those networks to engage the community in campaigns. A large component of social campaigns is content marketing, which involves the creating, curating and cultivating of text, video, images, graphics, e-books, whitepapers and other content assets that are distributed through media platforms and the social graph. Social campaign management can enable marketers to make both event-triggered and real-time adjustments to inbound and outbound ad campaigns, rather than making changes after the fact.

Social campaign management has become the most sought-after use case of social for CRM. Companies in the retail, consumer goods, media and entertainment industries have historically dominated the space; however, automotive, hospitality, transportation and financial services companies have all made a big push into social campaign management during the past 12 months. Organizations including the BBC, Ford and Kraft Foods run active social marketing campaigns.

People

IT professionals in support of marketing will need to connect with the following marketers to realize success in social campaign management:

- **Social marketing managers** run social campaigns as a way to refer new clientele and create revenue-generating opportunities for the business.
- **Brand managers** use social campaigns to keep their brand in front of their social-savvy audiences, showing their brand is in demand.
- **Digital marketing/multichannel campaign managers** use social campaigns as a part of their multichannel campaign management strategy.

IT professionals may also be involved in social campaign management strategies:

- **CRM marketing managers** will be responsible for supporting social as part of a multichannel campaign management effort and will need to ensure that compatible applications are being developed, or invested in, for all marketing needs.
- **Data scientists** may become involved in identifying key performance indicators (KPIs) for the business impact of social campaigns, which often eludes marketers.

Process

- **Determine how to store shareable content:** This may be something that marketers can do via a content management system, or it may be something they need to build or invest in exclusively for social campaign purposes.
- **Enable content sharing via multiple channels:** B2B and B2C companies are usually active on Twitter, B2C on Facebook and B2B on LinkedIn. Decide whether a site such as Pinterest, Instagram or Google+ is right for your brand (see "How to Choose Social Sites That Suit Your Marketing Goals").
- **Allow for moderation and approval workflow:** Companies that need to develop a review process before publishing content should do so before opening up social campaign management across their organizations and partners.

- **Integrate with multichannel campaign management processes and technologies:** To achieve the highest degree of business value from social campaign management, you must integrate social campaign management processes and lessons with traditional marketing campaign management.

Technology

Technologies that support social campaigns offer capabilities for:

- Storing social content and messaging for reuse throughout submarkets of the organization
- Sharing and designing multimedia content to serve as the backbone of social campaigns
- Review and approval of content for companies with all different levels of regulatory requirements and those looking to more conservatively onboard new social marketing employees
- Tracking and monitoring campaign reception to determine optimal content types and times to share
- Integrating with traditional marketing and customer data to increase the ability for personalization, track Web referrals and identify social marketing's impact on sales

Sample vendors include Adobe, Falcon Social, Google Wildfire, salesforce.com and Oracle.

Market Research, New Product Introductions and Test Launches

Market research, new product introductions and test launches for applications of social media enable marketers to collect feedback on new products or services, before and after their initiation, from open and closed communities. Social tools and techniques can offer increased reach and efficiency for acquiring feedback on emerging products and programs. By leveraging technology to bring together individuals from geographically diverse areas and target profiles, you can assemble a wide range of opinions and develop the potential to build a diverse group of early new product adopters or generate immediate post-launch feedback.

This approach can also lower costs and increase speed to insight, as the collection or formation of virtual focus groups can be quicker and more cost-effective, and, with the incorporation of advanced visualization tools, can offer equally actionable lessons. Social market research, testing new product concepts and test launching is particularly popular with consumer goods, retail and media companies, and it also has a foothold in telecom, manufacturing, services industries and IT. Organizations such as National Geographic, Virgin Mobile and U.S. President Barack Obama's 2012 Re-election Campaign have used social media as grounds for testing and research.

People

IT professionals in support of the marketing effort will need to connect with the following marketers to realize success in market research, new product introductions and test launches:

- **Social marketing managers** should be involved in social media market research strategies, the introduction of new products and test launches of new products and services on social media as advisors to market researchers and product marketing managers regarding the most important networks to include.
- **Product marketing and brand managers** can use social media applications for test launches of products or services to determine how best to communicate about a product or service's value based on reception from a large sample base.
- **Market researchers** are heavily involved in conducting market research over social media and are able to apply social media input as another source of market intelligence.

Market researchers might also sit in the IT part of the organization and, along with several of their counterparts, are responsible for the success of social-media-based market research, new product introductions and test launches:

- **Business analysts** may be responsible for identifying gaps in organizational knowledge where social market research could supplement traditional means of

gathering market feedback.

- **Product development managers** can use social media to introduce new or beta products to market and gather feedback for further development or enrichment.

Process

- **Decide which steps will benefit most from social input and data:** Social input can be used in various stages, such as new product/service development, adoption and prototype testing, and it is likely to be used in a combination of traditional methods.
- **Decide whether to use an existing community or a new one:** For some organizations, leveraging existing resources such as a company Facebook page or public Twitter and forum feeds may be a viable option. For others, private community panels might be a better approach.
- **Align search terms or forum topics to clear objectives:** We often advise clients to determine what questions they are trying to answer through social market research, so that they recognize value versus creating another noisy source of information.

Technology

Technologies supporting market research, new product introductions and test launches via social media require:

- **A means for aggregating feedback** that could come in the form of a community panel or social listening tool.
- **Social analytics capabilities** for identifying trends, sentiment and demographic insight.
- **Reporting tools** for easily communicating insight to the appropriate marketing, communications and product development teams.

Sample vendors include Converseon, NetBase, QuestBack, Omnicom (Communispace) and Vision Critical.

Idea Management

Idea management in the context of marketing involves engaging a community to share, capture and vote on ideas to create or improve products, service pricing, packaging, distribution channels, campaign or program concepts, and other issues. Companies that believe they have socially engaged, brand-loyal user bases may leverage idea management tools and techniques to determine the best approaches for developing and launching social loyalty programs.

Idea management is popular in the consumer goods, financial services, banking and retail spaces and has been used by companies such as Starbucks, Dell and Barclaycard to refine products and services offered to consumers.

People

IT professionals in support of marketing will need to connect with the following marketers to realize success in idea management:

- **Social marketing managers** will use idea management tools and techniques in cooperation with brand managers and product development professionals to establish projects on social platforms and guide interaction and engagement patterns.
- **Brand managers** use idea management in their ideation and long-term planning cycles, using insights collected to understand customer needs and inform their overall development plans.

IT leaders are also asked for their support in idea management initiatives:

- **Product development managers** use idea management to help fuel product or service innovation.
- **IT community managers** may be responsible for building and/or administering community platforms that supplements idea management.

Process

- **Identify a venue for contributing ideas:** This may be an existing community or a

new, purpose-built community.

- **Create a means for organizing ideas:** Decide whether ideas will be organized by product, business function or some other means to funnel comparative ideas into a central location.
- **Develop a scoring system to determine top ideas:** Are your ideas going to be voted up or down? Are your ideas going to be ranked by stars? Predetermine how you will identify ideas that are ready for evaluation.

Technology

Idea management tools must be able to provide:

- **Support for communities** in originating and fleshing out promising ideas inside and outside a company.
- **Administrative support** for capturing ideas and enabling innovation leaders to organize and track ideas.
- **Analytical support** for aggregating, scoring, voting, prioritizing and measuring for the leaders and participants of innovation or ideation programs.

Sample vendors include Kindling, Lithium, OneDesk, salesforce.com and Spigit.

How It All Works Together

These uses of social marketing, idea management, market research, social media engagement for marketing, advanced social analytics for marketing and social campaign management are in tune with life cycle management, bringing in the customer from the beginning and at each stage, crowdsourcing product and services ideas, gathering competitive analysis and feedback from communities, from the launch to the eventual support of products and services. Many marketers continue to struggle and experiment with purposeful and accountable social marketing, so IT leaders should work with them to focus social marketing initiatives using life cycle management processes and determining social's potential role at each step.

Every company is unique, and maturity and use case will vary by industry, company size, demographics and geography.

Gartner Recommended Reading

Some documents may not be available as part of your current Gartner subscription.

"The Concise Social for CRM Vendor Guide, 2013"

"Top Use Cases and Benefits of Social for CRM in 2013"

"What You Need to Know About Social Media for Customer Service"

"What You Need to Know About Social Media for E-Commerce"

"What You Need to Know About Social Media for Sales"

Related Research

This is part of an in-depth collection of research. See the collection:

- Organizations Progress, but Continue to Struggle With Social for CRM

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