

How To Make

CONTENT SOCIAL:

Learn How Incept's Employees Use
Social Media to Engage Customers



► OPPORTUNITY

Canton, Ohio-based Incept faced a dilemma. As a contact center working to recruit blood donors, they frequently made cold calls urging individuals to donate blood. Although this proved effective, Incept knew there had to be a better way. After all, today's blood donors are not sitting at home awaiting a blood drive telephone call, nor will many people donate life-saving blood to "just anyone" who happens to have their phone number. How could Incept establish and nurture connections with new donors for their clients, the medical companies and real people requiring blood?

The answer: use social media and content marketing techniques to connect clients with prospective donors.

Incept understood that, for maximum impact, their contact center employees needed an online presence where the donors (their customers) are, whether on a Facebook page, a blog, or Twitter. Incept felt these person-to-person social connections would increase the desire to donate blood. They also felt that this "conversational marketing" approach, using content, would be applicable to other businesses, too.

► SOLUTION

Why transition to content marketing using new media tools?

Incept has already been using one-to-one communication via phone calls, but they knew they could do more.

"We drew a big circle around person-to-person communication and said, 'What else can that be? That could be inbound calls, that could be outbound calls, that could be live chats, that could be email that could be social media.' And we started spending a little more time on social media," explains Chief Results Officer Sam Falletta.

ORGANIZATIONAL PROFILE

What They Do: Conversational Marketing

Who They Help: Fortune 500 and non-profits, with a specific focus on blood banks in the United States

Industry: Marketing

Number of Employees: 200

Size of Marketing Department:
Outsourced

Insource or Outsource Marketing?

Outsource: One person (Nate Riggs of SBS) dedicated to the social media aspect of this project, with outsourced help in brand and communication strategy Next Level Thinking.

In Business Since: 1993

Headquarters: Canton, OH

Incept's early success building these social connections both within the company and online with prospects has yielded some "blood bankable" results. Now the company is establishing a separate arm that will manage similar practices for companies in other industries.

We'll explore how Incept spent the last year working to reposition their brand under the idea of conversational marketing using social media for these efforts. The conversational marketing model focuses on content and communication – regardless of the channel, such as online chat, email, mobile, and social media services.

Their first order of business: remaking rank-and-file employees into "internet conversational marketing experts" (iCMEs) capable of producing content on social media channels. And not just any content, either, but content that would inspire action from donors, make a measurable difference, and simultaneously build internal company culture.

► STEPS TO SUCCESS

The process began in Incept's marketing department with the help of two outside partners, Next Level Thinking (NLT) and Nate Riggs of Social Business Strategies (SBS). They focused on four tasks:

- Devise a strategy tailored to the blood bank audience (NLT)
- Create a social media plan (SBS)
- Train employees and management, on a company-wide basis, on how to create and use content within the conversational marketing approach (SBS)
- Track the efficacy of social media efforts (SBS)

From there, Incept implemented the following action plan, which was divvied into manageable segments.



Sam Falletta

Chief Results Officer
Incept

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Create a Company Blog

First, Incept looked internally to begin building a public-facing blog via the following steps:

- Identify a “beta team” of collaborative bloggers. To do this, Incept choose contributors based on personality testing, writing samples, and interviews during the strategy phase. By working with a small group of contributors, Incept was able to develop a plan that they could then extend to more employees as needed. The goal was to publish 20 posts per month.
- Add in management contributions. Incept felt that it was important that the management team members also contribute to blog contents. However, their contributions were limited in number due to their other responsibilities.
- Launch a contest to recruit other contributors. Once the beta team was in place for three months, a Facebook contest was announced internally to recruit other bloggers within Incept. (Are you wondering why Incept would use Facebook to recruit their own employees? More on Facebook below.) Posts were submitted, and five winners were featured. These five individuals were given the privilege of becoming the next iCME/ blogger trainers. Goal: Identify five additional bloggers, include their writing efforts, and reward them with status as team trainers and blog contributors.
- Establish an editorial calendar. The calendar assigns blog contributors to post on particular days and/or on particular topics. The calendar is set up based on contributor roles and their level of contribution. For example, new iCME's are given specific assignments, whereas more experienced bloggers are given more leeway in their contributions. C-levels are assigned specific topics areas of focus, and contribution frequency was increased. Goal was increased to 30 posts per month.



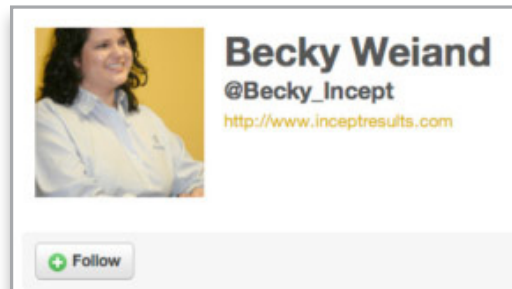
**Incept Blog:
with participants
company-wide, its
purpose is to present
news, examples, and
thoughts on industry
trends; it also provides
a public, unofficial,
“social learning”
platform for employees
to share ideas**

Create a Facebook Page

At first, Incept focused on using social media, specifically Facebook, to increase internal communication. A small team was designated to initiate the process. Everyone then participated in establishing a set of Facebook use guidelines. Employees were introduced to using Facebook organically, which allowed for peer-to-peer training between Facebook-savvy employees and those less familiar with the medium.

Ask Employees to Use Twitter

Finally, Incept embraced real-time conversations with Twitter. Employees were asked to establish “@names” or Twitter account names, that identified their first names and their affiliation with the company (for example, @Becky_



Incept). iCMEs are free to tweet on topics they personally enjoy, such as music or sports, allowing individual personalities to emerge online and enhance connections both online and offline. iCMEs are expected to share company-centered tweets on a regular basis within this context.

iCME Stephen Smith explains, “All of our Twitter accounts are completely unique. I focus a lot on music and fishing. Tim focuses a lot on his passion for movie making. It brings in a lot of neat people who we really wouldn’t have gotten access to if we had stuck to discussing just what Incept does already.”

The unexpected bonus? Enhanced company culture. Smith described discovering a common interest, via Twitter, with another employee in a different part of the building. “And it’s helped us as individuals, Steven_Incept, Becky_Incept, Timothy_Incept, to establish our own set of connections that all fall back to Incept in the end.”



Lead by employees (iCMEs), the Facebook page engages internal teams as well as clients and possible donors

Develop Social Media Guidelines

“Jumping right in” is the first step to establishing guidelines for social media use.

Nate Riggs of SBS explains: “[M]ost companies develop a social media policy in a vacuum. They develop the policy before they’ve ever actually taken the time to engage in the media and really have the experience they need to develop the right policies for the business.

So, at Incept, we took a little bit of a backwards approach. We actually turned on the social media channels and started getting people engaged for a couple of months. We then went through the process of developing the social media set of guidelines that aligned with the core values of Incept with the team who had about two to three months of experience actually working inside the media.

Establishing these guidelines began with the company’s stated core values. Using copious Post-It notes, the team mapped possible scenarios based on frequently asked questions. They also discussed potential online interaction with customers and competitors. For example, how should employees disclose company information? The team also collectively defined the escalation points: when should an employee defer a response to someone else? Finally, the team discussed the ways in which an employee can interact on the company’s Facebook page, and the differences between private and public content.

Through this process, Incept and SBS were able to develop a set of ground rules governing the company’s social media interactions. These guidelines served as rules of conduct detailing what information could be shared and how to share it. The rules also provided an understanding of content or interactions considered inappropriate. For example, employees were not to disclose company news unless explicitly approved to do so. These guidelines provided the creative leeway necessary for employees to participate in and personalize the social media experience.

PROCESS OVERVIEW

Who Was Involved?

► Incept Team

Chief Results Officer: Sam Falletta

Client Results Coordinator: Rebecca Weiand

Internet Conversational Marketing

Expert (iCME): Stephen Smith

Internet Conversational Marketing

Expert (iCME): Timothy Johnson

► Outsource Team

Social Business Strategies: Nate Riggs, Prin.

Next Level Thinking: Eric Poerschke, Partner

What Was The Time Commitment?

- * The social media process began in early 2010
- * There is an ongoing commitment to develop content at all levels of the company

What Tools Did They Use?

- * **HootSuite** - to manage multiple conversations and team participants
- * **Tap11** - for Twitter-based brand monitoring
- * **Google Reader** - to track industry and client news
- * **The Flip!** – handheld video camera - to “shoot and share” video on social media, for either spontaneous footage or planned events

Establish a Social Media Philosophy

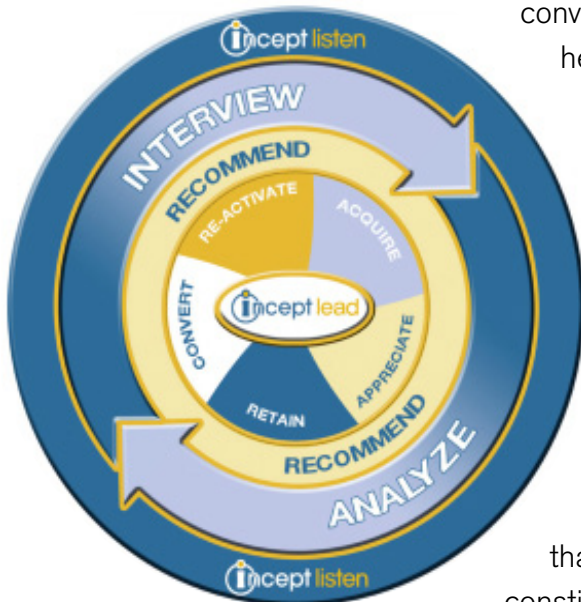
Tools and guidelines are necessary, but they do not operate alone. Incept also gave considerable thought to the driving philosophy behind the conversations.

Falletta explains: “When we did the whole strategy process we basically identified that, really regardless of the industry, or the function, there’s five types of conversations you can have with current or potential customers: Retain, Convert, Re-Activate, Acquire, or Appreciate.” Falletta offers an example: a blood bank client indicates to Incept that they need new donors.

What you find out is that they really don’t [need new donors]; they just need to quit losing so many of their current donors. So we would say, ‘You don’t want to do an acquisition program, you want to do a retention program.’”

Falletta then applied that model online: “We said, ‘Okay, let’s listen to these Twitter accounts and then determine which of these conversation types apply.’ Online, it’s really heavily weighted towards appreciation. So if

somebody has good content and it gets retweeted, we call that appreciation conversation. If somebody has good content that’s valuable and you reply and say, ‘Yeah, thanks, that really helped me,’ we would call that appreciation. If someone’s complaining, we have one of our iCME’s reach out and manage that relationship. We’d call that a retain conversation.” Falletta points out that appreciation, retain, and acquire conversations constitute the majority of their work.



4 LESSONS LEARNED

1. Start using social media with a small beta team BEFORE the guidelines are created. This helps develop a more solid framework for guidelines and gives practical front-line experience prior to a larger roll-out.

2. Using guidelines as a roadmap, educate employees on the difference between “individual content” and “company content” produced for social media.

Make sure to spend time considering how your company’s online presence and content are separated from personal employee profiles. Anticipate that the lines will get blurry.

3. Frequently discuss existing online content and conversations with regard to guidelines as a way to train employees.

This helps everyone understand how the guidelines apply in a variety of situations. One size does not fit all.

4. Hire for your guidelines. If you hire people who fit the company culture and believe in your values, it’s natural for them to follow the guidelines you’ve designed.

► RESULTS ACHIEVED

Before the holiday season, Incept's Facebook page (www.facebook.com/InceptSaves) was abuzz with client and employee participation. The discussions online ranged from casual topics ("How much snow can we expect?") to more serious discussions: one client expressed gratitude for the work the blood donation center had done for an injured soldier in the family.

Says Falletta, "We had the holiday party without any attempt to try and create good content that our customers or potential customers would see on the Facebook page. But all of a sudden you see this overwhelming response to employees saying, 'I love my company'... We would never have thought of that a year ago, that kind of feedback in a public place. ... It certainly points to a lot of the offline world driving online content and vice-versa. So the timing was neat to see exactly how much everybody engaged that weekend."

► WHERE THEY PLAN TO GO FROM HERE

Incept is focused on delivering social media presence management for their blood center clients. Incept also plans to expand social media management services to other industries, non-profits, educational institutions, and industry events such as trade shows and conferences. Currently, Incept is working on a few of these accounts with early adopter clients like The Ohio Growth Summit, and The Taylor Institute of Direct Marketing at the University of Akron.

3 THINGS THEY'RE GLAD THEY DID

Rebecca Weiland, Client Results Coordinator, weighs in on what made their social media program successful.

► **Obtain outside expertise.** "I am glad we just jumped in with guidance from Nate [of Social Business Strategies]," says Rebecca Weiland. "Our Facebook page has become a great resource for our employees. They are engaging on it more and more, and we now have clients engaging on the page, plus it has become a great place for additional employee recognition!"

► **Give the process time.** "My recommendation for others when starting out is: 'don't give up.' When we first started, our engagement was very little and mostly from our management staff, which wasn't the goal. But we kept with it, tested new content and eventually found a mix that has our engagement percentages at 14 to 16 percent! There is a lot of trial and error in the beginning, but success is definitely at the end." explains Weiland.

► **Continually improve.** Be open to new ideas and approaches – from all areas of the company.

► WHAT YOU CAN LEARN FROM THE EXPERT

Social Business Strategies helped Incept develop their social media guidelines and plan. Here, consultant Nate Riggs weighs in on his experience with Incept.

In recent years, customers have called for transparent communication from both the B2B and B2C companies with whom they choose to do business. With growing popularity of social media tools and the ease of content publishing on the internet, companies that organize and empower teams of people across departments to engage in those conversations stand to gain significant advantages in internal connections between all levels of employees, direct sales and customer retention, as well as public relations. Incept is one of the leading companies leveraging their culture as their brand.

At the end of the day, the future of markets and marketing communications lies in empowering your employees to not only create and distribute expert content, but also to engage frequently in conversations with each other and customers in an open and visible media on the web where feelings of connectedness can be generated.



Nate Riggs
Social Business
Strategies

**“Incept is one
of the leading
companies
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► A LOOK AT KEY CONTENT

- Incept Blog
- Incept Facebook Page
- Incept Twitter Account
- Incept LinkedIn Group



3 THINGS THAT FOSTERED SUCCESS

► **Don't think of social media as "just" marketing or "just" PR.** Instead, "I think we looked at it very much as a customer [service] function because it is real conversation with real individuals," says Falletta.

► **Respect that transparency is here to stay, and embrace it.** "Revealing bad news is better than trying to cover it up or fake it. Welcome feedback in an effort to improve," says Falletta.

► **Understand that social media is an accelerant.** Falletta explains, "Social media really is just an accelerator of what's happening offline. So if you have a bad culture, it's just going to be reflected online, and if you have a good culture it'll be reflected online. The same thing goes for products and services in most cases."

This is why Incept doesn't fear social media content: Falletta explains, "We had so many people say, 'What do you mean you're going to open a Facebook page for your employees? Aren't you worried about what they would say about their managers?' And I would say, 'Yeah, I guess that's a concern, but isn't that more of a management issue... than it is a social media issue?'"



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