Social Media Matrix

Matching Corporate Goals with External Social Media Activities

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Abstract. In this paper we introduce the Social Media Matrix, a practitioner-oriented instrument that supports companies to decide based on their corporate or communication goals which social media activities to execute. The matrix consists of three parts: 1. Social media goals and task areas have been identified and matched. 2. Five types of social media activities have been defined. 3. The matrix provides a structure to assess the suitability of each activity type on each social media platform for each goal. Whereas the first two parts can be generally used, the assessment must be conducted explicitly for an industry sector. A ready to use assessment for the German B2B sector has been exemplarily compiled from expert-interviews with practitioners and by reviewing concrete social media activities. The matrix is used as a basis for social media consultancy projects and evaluated thereby.

Keywords: web 2.0, social media, corporate social media, marketing, communication, planning, instrument, tool, decision tool, practitioner-oriented, goal-oriented, business-to-business, B2B.

1   Introduction

Facebook, founded in 2004, according to its own website[1] had 845 million monthly users at the end of December 2011. Together with platforms like Twitter[2], LinkedIn[3] or YouTube[4] and other web 2.0 sites like blogs and forums, social media's impact on society and its relevance for business cannot be denied. The Social Media Governance Study 2011 [1], an empirical survey of communication managers and PR professionals in companies, governmental institutions and non-profit organizations in the German-speaking part of Europe: Germany, Austria and Switzerland, reveals that 71.4 percent of all organizations currently actively apply social media in their communications, which is a growth of 17 percent compared to the survey result of 2010 [2]. Only

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[1]   www.facebook.com
[2]   www.twitter.com
[3]   www.linkedin.com
[4]   www.youtube.com

7 percent of the respondents have neither applied nor planned to use social media. In the current project CLOUDwerker[5], which is partially funded by the German Ministry of Economy and Technology, we experienced in several interviews that even small crafts enterprises are aware of the importance of social media and want to enter this field. Furthermore a survey of the University of Darmstadt [3] examined social media use by business-to-business (B2B) oriented companies, which seems to be different from consumer oriented businesses (B2C) and therefore is also a topic we are addressing with this paper. Structured approaches, methods and tools that support the process of choosing the `right` social media activities for a company have for a wide range of industries and businesses not been introduced yet. Our work aims to close this gap and suggests an instrument that can provide the necessary backing for corporate social media decisions. In this paper we concentrate on external social media activities, in contrast to such activities that are dealing with the internal use of social media also referred to as enterprise 2.0 [4].

Current literature concentrates on different aspects of social media and is examined in section 3 of our paper, after introducing our methodology for developing the Social Media Matrix in section 2. In section 4 we will present the overall structure of the Social Media Matrix. Section 5 discusses the exemplary assessment of social media activities. We show how the Social Media Matrix can be used in section 6 and conclude with describing future extensions in section 7.

2   Methodology

The basic idea of matching corporate and communication goals with concrete social media activities on social media platforms arouse from talking to practitioners in companies across different industry sectors. Although it was our intention to create an instrument which is widely applicable, in the initial phase of our work we have chosen to narrow down our target group on business-to-business (B2B) oriented companies in Germany.

Besides considering relevant literature we have carried out six structured expert interviews [5] with practitioners who are in charge of social media activities in such B2B companies to identify their:

- overall approach, perceived potentials and challenges
- goals that should be met by social media activities
- best practices from experience and observation

The evaluation of the documented interviews confirmed the necessity of a structured approach, served as a review and completion of our goal list and formed the base for the assessment presented in section 5. Furthermore by including the intended end user of the Social Media Matrix its relevance to practice could be ensured.

Our assumption that it is essential to assess social media activities and accumulate best practices and examples for an industry sector rather than only for goals has con-

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[5]   www.cloudwerker.de

firmed and today during the evaluation in consultancy projects our matrix can easily be adapted to other sectors e.g. business-to-consumer oriented industries.

3   Literature Review

Concerning social media, companies must answer the questions what to do (strategy), how to do this (organization: roles and processes) and which tools offer support to do so (information systems). This approach can be derived from Oesterle [6] who suggested this classification for business engineering tasks in general. Furthermore our practitioner-oriented view asks to distinguish between three solution types:

- structured approach for choosing and optimizing concrete social media activities
- models, methods and checklists for designing and implementing social media activities
- instruments supporting structured approach, including models, methods and checklists

Figure 1 gives an overview of social media publications and classifies them according to the above mentioned criteria.

			business engineering			solution types		
			strategy	process	information systems	structured approach for choosing and optimizing concrete social media activities	models, methods and checklists for designing and implementing social media activities	instruments supporting structured approach, including models, methods and checklists
scientific	Hettler	[9]	X	(X)		X		
	Kaplan et al.	[7]	X			(X)		
	Mangold et al.	[8]	X			(X)		
	Peters	[10]	X		(X)	X	(X)	(X)
	Zerfaß et al.	[11]	(X)	X		(X)		
other	Evans	[15]	X			(X)	(X)	(X)
	Levine et al.	[21]	X					
	Li et al.	[16]	X		(X)	(X)	(X)	
	O'Reilly	[18]	(X)			(X)		
	Scott	[23]	X					
	Weinberg	[12]	X	(X)		(X)		

Fig. 1. Classification of social media literature

Additional aspects of our literature review are summarized in the following paragraphs:

- **Scientific level**: A general distinction of literature about social media can be drawn between scientific studies e.g. Kaplan and Haenlein [7], Mangold and Faulds [8], Hettler [9], Peters [10], Zerfaß [11] and a tremendous number of key expert views on the use of social media in business e.g. Weinberg [12], Brogan [13-14], Evans [15], Li and Bernoff [16] and Solis [17]. Due to being a fast moving new field of study, many of the experts and key authors in social media are current practitioners in this field, who have been widely-accepted as thought leaders e.g. key bloggers like Jeff Jarvis[6].

- **Definition of social media**: There is a discussion about the concept of social media and how it differs from related concepts such as web 2.0 and user generated content [7][12][18-20]. The authors provide general advices for companies on how to engage in social media and how to communicate with their stakeholders on different platforms. In this regard Joel [19] contends that marketing of trust and transparency is important and focuses on the idea of 'building of a community based on trust'. Evans [15] shares this point of view and emphasizes the importance of involving customers in social media conversations with regard to social customer relationship management.

- **Impact of web-based activities**: Many early approaches consider not only technological development but also the changes in the ways organizations and end-users use the web. As one of the first books on web 2.0 'The Cluetrain Manifesto' [21] provides a set of 95 theses, which aim to examine the impact of the internet on both consumers and organizations. The manifesto contends that internet technologies enable people to have "human to human" conversations, which have the potential to transform traditional business practices. O'Reilly [18] describes the revolution of Web 2.0 as the era of participation and collective intelligence, and with his book "The wisdom of crowds"[22] James Surowiecki provided a standard work on the chances of this new development beyond using it for PR and marketing purposes.

- **Structured approach**: Few studies [9-11], [16] provide structured approaches, suggesting strategies and models for social media engagement and for implementation of social media activities. Forrester Research executives Li and Bernoff [16] develop a framework for engaging in the 'groundswell' based on following activities: listening, talking, energizing, and supporting. The framework attempts to help companies to understand and engage with their customers within the social media space. Although Li and Bernoff suggest a clear community engagement model and segment web 2.0 participators, it does not satisfactorily provide an understanding of the contribution of these activities to corporate objectives. Zerfaß [11] suggests the concept of 'Social Media Governance' as a regulatory framework for incorporating social media, based on a quantitative survey in Germany [1-2].

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[6] www.buzzmachine.com/about-me/

- **Overall social media concept**: Although 'Social Media Governance' by Zerfaß is an overall concept concentrating on organizational issues, it focuses on the PR-perspective and omits that social media can be used to achieve goals in fields such as product management or recruiting. Other studies analyze the use of social media from specific viewpoints, for example PR [23], social media marketing [12][15], reputation management [10].
- **Social media marketing**: Some authors [12], [24] concentrate on social media marketing and understand social media as a chance to promote websites, products or services and 'to communicate with and tap into a much larger community that may not have been available via traditional advertising channels' [12]. Others are adamant that social media and marketing are distinctive disciplines and independent from each other. Brogan [14] for example suggests that "Marketing is NOT Social Media - Social Media is NOT Marketing". Focusing on the PR-perspective, Scott [23] believes that traditional public relations practices 'do not work anymore'. He contends that web 2.0 allows companies to take ownership of information and independently publish it instead of pushing it in the form of press releases to traditional media outlets. Although a lot of works analyze social media from a specific perspective, only a few studies focus on the integration of social media in the business practice. Mangold and Faulds [8] see social media as an element of the promotional mix within the marketing mix of a company and stress the need for integration of social media activities into communication strategies. They provide a set of examples for companies, which have successfully integrated social media. However, the study does not contain a well-structured approach, explaining how social media can be incorporated.
- **Social media management tools**: For monitoring and analysis of social media activities a new tool class has established which plays an important role in social media management. The provided opportunities for companies using these tools and their specific functions have been examined in several market studies [25-27]. The publications see a trend of these tools developing towards engagement platforms, which allow companies to directly react on found contributions in social media and a necessity to make the functions available for workgroups. In a white-paper Owyang and Lovett suggest a social media measurement framework [28] and projects like Next Corporate Communications[7] research value and return on invest (ROI) of social media, but general, in depth and ready to use instruments and key performance indicators have not yet been revealed.
- **Model for social media planning**: Despite the high interest in the field of social media, well-structured approaches and models for realizing social media activities in the business practices are to our knowledge limited available. Although some scientific studies as well as some key experts suggest that planning social media activities has to be a part of a corporate communications strategy [8-9],[11] , still they do not satisfactorily provide solutions that help companies to plan and coordinate activities.

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[7] http://www.nextcc.de/

As shown in figure 1 current literature focuses on 'strategy' but when it comes to the more practice-oriented views on 'processes', 'information systems' and concrete 'models, methods and checklists' most generalizations do not work anymore. With the Social Media Matrix we suggest an 'instrument supporting structured approach, including models, methods and checklists'.

4 Social Media Matrix and its overall structure

Our work supports the methodical selection of appropriate social media activities. The suggested instrument 'Social Media Matrix' aims at providing a match of suitable social media activities to relevant social media goals of companies. Thus, the matrix provides (1) a classification of social media goals and dedicated business tasks, (2) a categorization of social media activity types, and (3) the concrete assessment of each activity type on each platform for each goal, including a collection of examples. Figure 2 illustrates the overall structure of the Social Media Matrix.
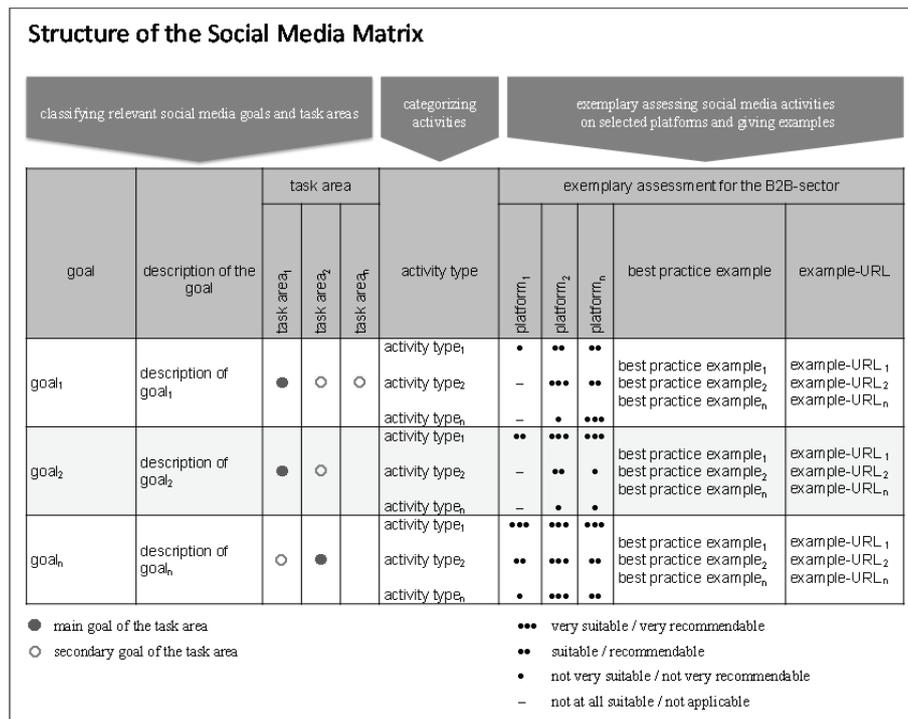
Structure of the Social Media Matrix

		classifying relevant social media goals and task areas			categorizing activities	exemplary assessing social media activities on selected platforms and giving examples				
		task area				exemplary assessment for the B2B-sector				
goal	description of the goal	$task area_1$	$task area_2$	$task area_n$	activity type	$platform_1$	$platform_2$	$platform_n$	best practice example	example-URL
$goal_1$	description of $goal_1$	●	○	○	$activity type_1$	•	••	••	$best practice example_1$ $best practice example_2$ $best practice example_n$	$example-URL_1$ $example-URL_2$ $example-URL_n$
					$activity type_2$	–	•••	••		
					$activity type_n$	–	•	•••		
$goal_2$	description of $goal_2$	●	○		$activity type_1$	••	•••	•••	$best practice example_1$ $best practice example_2$ $best practice example_n$	$example-URL_1$ $example-URL_2$ $example-URL_n$
					$activity type_2$	–	••	•		
					$activity type_n$	–	•	•		
$goal_n$	description of $goal_n$	○	●		$activity type_1$	•••	•••	•••	$best practice example_1$ $best practice example_2$ $best practice example_n$	$example-URL_1$ $example-URL_2$ $example-URL_n$
					$activity type_2$	••	•••	••		
					$activity type_n$	•	•••	••		

● main goal of the task area
○ secondary goal of the task area

••• very suitable / very recommendable
•• suitable / recommendable
• not very suitable / not very recommendable
– not at all suitable / not applicable

Fig. 2. Structure of the social media matrix

(1) Classification of relevant social media goals by task areas

Social media can be used for achieving various goals of different departments. The matrix provides a classification of social media goals by task areas, in order to allow

the user to focus on analysis, planning, execution and controlling of social media - away from the company's functional perspective and toward the integrated communication management concept [8], [11]. To facilitate orientation and coordination with regard to the practical application of the instrument, we have identified different social media task areas and matched these with the goals. The following eleven task areas have been assigned to a total of 29 social media goals:

- media relations
- reputation management
- agenda setting
- issues management
- crises management
- branding & brand management
- customer relationship management & influencer relationship management
- trend, market & competition analysis
- social media marketing & social commerce
- market research & monitoring
- product & innovation management

A task area may pursue more than one goal. Furthermore the single goals may impact each other. For this reason, we have distinguished between main and secondary goals within a task area. For example, 'increasing brand awareness' is defined as a main goal within the task area 'branding & brand management'. Whereas 'building relationships to influencers in social media' is a secondary goal of 'branding and brand management' which will contribute to the achievement of the main goal.

(2) Categorizing activities

A major outcome of our work was to realize that before assessing the suitability of a platform for a goal the type of activity must be distinguished. We have therefore defined five types of social media activities, which cover all possibilities:

- **content**: Content refers to the publishing of information in the form of text, image, graphic, audio and video. This category includes only activities, which are based on one way communication, e.g. a company's info on the Facebook fan page or the channel on YouTube.
- **interaction / dialog**: This type comprises activities aimed at interacting and discussing with stakeholders. Such activities can be for example posts on the company's wall on Facebook or a group on LinkedIn.
- **listening and analyzing**: This activity type is about finding conversations about the company, its brands and products and analyzing these in order to turn them into valuable insights. This monitoring can be manual or automated and can furthermore include keyword search about competitors, current issues, important stakeholders etc.

- **application**: Expanding the possibilities of a social media platform by own applications to enable further interaction is summarized under this activity type. For example Facebook allows programming of own applications.
- **networking**: Taking active steps to find contacts and to build relationships is referred to as networking. This includes e.g. @-referencing other users on Twitter or inviting users to a group on LinkedIn.

> (3)　Assessing platforms and finding examples

Whereas goals, task areas and activity types are generally applicable this third part of the Social Media Matrix must be adapted both to the industry sector and the country/regional context. It comprises a list of the most relevant social media platforms in one country and the assessment of the suitability of each activity type on each platform for each goal. Additionally best practices are collected and added as examples to the assessment.

The assessment can either rely on expert rating or derive from examples and best practices. For our exemplary assessment for B2B companies in Germany we used a combination of both approaches. A third possibility which we shortly discuss in the 'future research' section is crowdsourcing the assessment.

5　Assessing suitability of social media activities for German B2B companies

To make the Social Media Matrix a ready to use instrument for planning corporate social media activities it must include specific assessment and examples to answer the question "How useful is a certain activity type on a certain platform to reach a certain goal?". In contrast to social media goals and to a certain extend also platforms which can both be generalized, the assessment in the matrix must be explicit, e.g. for an industry sector. In our work social media activities of German companies that predominantly follow business to business (B2B) transactions have been reviewed and evaluated according to goal, activity type and used platform to sample such a specific assessment. Together with the results of the expert interviews a directly applicable Social Media Matrix for the German B2B sector has been created which is at the same time through the examples a snap-shot of current social media use in B2B companies in Germany.

The social media platforms we considered in this use case were Facebook, Twitter, YouTube, Xing[8], Blogs and 'community platforms or forums'. For transferring the results to other than German markets the platform Xing should be substituted by LinkedIn which is its international pendant. For most goals content, interaction / dialog and networking are the predominant activity types. Our assessment shows that social media activities can be used in German B2B companies best to achieve these goals:

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[8]　www.xing.com

- building and improving product and brand image
- identifying, contacting and bonding influencers
- improving ranking on search engines
- generating leads
- employer branding and recruiting

Social Media activities that aim towards vending products or providing service and support over social media platforms are less suitable, due to the complexity of B2B products. Nevertheless it could be a strategy to explicitly address such goals that seem less suitable and are therefore less represented to create unexpected social media activities that by their newness gain more attention which in social media means success.

6   Application Modes

Integrated communication distinguishes four management phases: analysis, planning, execution and controlling [29]. The Social Media Matrix is primarily designed to support planning activities, but can also be used for analyzing industry sectors beforehand or controlling own activities. A second dimension in applying the Social Media Matrix is the starting point of decision making. Besides goals - platforms and best practices can be used. The proposed structure allows all three starting points. Furthermore target groups / stakeholders are often used as a starting point for activity analysis, planning and controlling. This perspective has not (yet) been considered in the matrix, but since target groups are an implicit part of goals and best practices further detailing the matrix in this respect is possible.

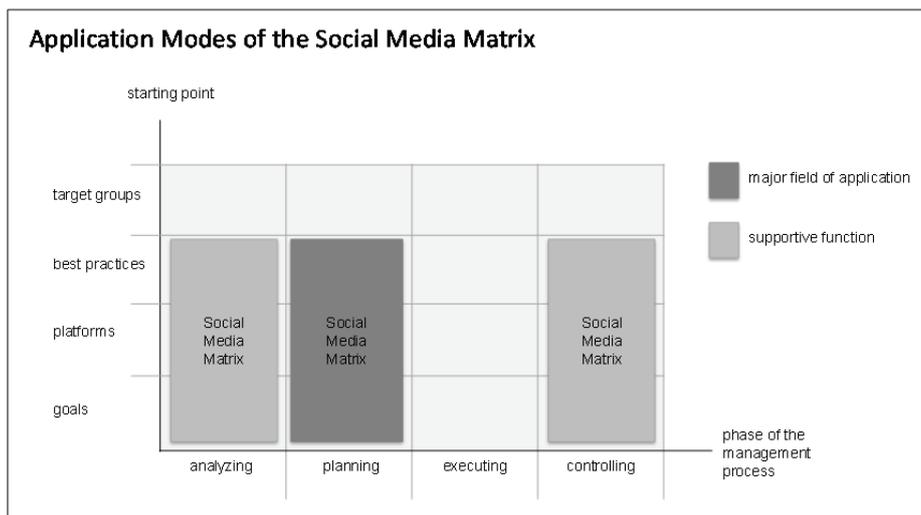Figure 3 illustrates the application modes of the Social Media Matrix.

Fig. 3. Application modes of the Social Media Matrix

We have initially implemented the social media matrix in Excel. The user can flexibly use the matrix for decision making by for example:

- prioritizing goals or filtering goals by task area
- using the assessment of the platforms to decide upon which platform to enter or to understand which optimization opportunities already used platforms offer
- using the assessment to identify which goals can best be achieved by social media activities
- using the given examples to better understand possibilities

7 Conclusion and future research

We have introduced an instrument for companies to choose social media activities based on corporate goals and an assessment of the suitability of certain activities on selected platforms. The suitability assessment has been conducted exemplary for the German B2B-sector. Moreover our Social Media Matrix contains an example set of realized social media activities in the B2B-sector in Germany, which can be regarded as best practices and provide orientation for the user. Therefore this is a ready to use tool for German B2B-companies which is currently evaluated during consulting projects. It has been shown, that our practical integrated approach has not been presented in literature so far.

This work builds the foundation of a more sophisticated tool for planning and controlling corporate social media activities. To close this paper, three selected aspects of future work are presented in brief in the following paragraphs.

- **Crowdsourcing example collection and assessment of social media activities**: Especially in the field of social media the web community is a great source for information which can be used for optimizing the Social Media Matrix. A web interface could be used to collect examples for corporate social media activities. Each example should be assigned at least one goal, the industry-sector, the platform and the activity type it refers to. In an international context, country information should also be provided. Incentive to enter this data could be the possibility to compare the entered activity with other activities in the same industry sector. Assessing activities for different sectors could be either by experts, or everybody. Exceeding critical masses is essential here.
- **Detailing social media platform representation**: Since marketing and corporate communications is often driven by target group segmentation, this information must be modeled within the social media matrix. One approach is to add target group information to the description of platforms. Ideally the defined parameters can be easily used to describe any platform and new platforms thereby could derive their assessment from existing data.
- **Estimating costs**: To make the Social Media Matrix an effective tool in terms of Common Value Management the assessment of social media activities must be expanded by adding cost factors for execution of an activity. Cost factors could be distinguished into initial cost and operating cost, they contain time elements (e.g.

singular vs. regular) and are interconnected with the available resources. It is a matter of research to what extend cost estimate and ROI of social media activities can be generalized.

8 Acknowledgements

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