



Social Media Workshop for Professional Services Firms

KEOGH CONSULTING

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Introduction

Many professional services firms have a website and may have some social media accounts. Firms are unsure about being more active on social media and whether or not it a good use of time. The reality is that with strategic use of content, you can reach a relevant audience and encourage that audience to take action and engage with your business. For many firms, a well-functioning mobile optimised website appearing properly in search results can achieve this and indeed have more value than a poor social media presence – indeed social media can be a nice to have rather than a need to have.

However, social media accounts can add value if they're used cleverly and allow clients engage with you – it is important to develop a social media strategy which supports a firm's overall objectives. This paper looks at the steps required to do so.

Link to a firm's overall strategy

Marketing communication is undergoing a digital revolution with blogs, podcasting and social network posts enabling broadcasting to potential audiences in the millions – business professionals now rely on their mobile devices to educate themselves with business related content. A firm needs to be able to inform clients and others about its goals, activities and offerings, and motivate them to take an interest in its professional services – a social media strategy is one element of a firm's overall strategy and can assist the generation of new business if well executed.

Communications take many forms and professional service firms need to understand that everything they say and do communicates. The real task is to make sure that all activities communicate the same thing. Professional service firms must start with a clear picture of the communication tasks facing them. The following are typical objectives:

- Build credibility, thought leadership and influence.
- Meeting information needs of employees and the public
- Create awareness & providing information about the firm's offerings
- Correcting inaccurate or incomplete information about the firm
- Maintaining or enhancing the image of the firm.
- Gaining client loyalty and support reaching audiences across the sales funnel
- Attracting new clients, generating leads and driving sales
- Attracting prospective employees to join the firm

Communications must have purpose and an understanding of the target audience. It is important to not have conflicting messages leading to a confused corporate image and brand position but rather communications which enhance exposure through a strategy that increases and maintains value add and brand proposition. In summary – a firm must do the following to develop and deliver a social media strategy: identify the target audiences; determine communication objectives for each; design messages; choose the media through which to send the message; select the social media source; and collect feedback to fine tune the strategy. Remember everything you post must be valuable to your audience. It should help them to solve a problem, keep them informed, entertain them and certainly look to engage them.

Given the nature of professional services projects and requirements for face to face interaction a social media strategy is part of the communications equation for professional services firms, but it does not replace listening well¹ to clients in order to track preferences, desires and requirements by going to the horse's mouth and asking the client.

Define the Mission of Your Marketing Communications

A communications strategy answers the question, "Why are we doing these activities?" As a rule of thumb, no more than 10% of time² should be allocated to Broadcasting activities with use of a range of communications and interaction that are high in conversational value – it is likely that most of the social media activity will be broadcast type activity for professional services firms. Once you have figured out why you are creating a communications strategy then you can figure out how to use it i.e. the communications tactics.



Figure 1 - Marketing Communication Objectives

The suggested approach is to engage in an iterative process of activities linked to your overall communication strategy (of which social media will be a part). Quite simply the "how" requires just four steps – 1. Understand your audience. 2. Craft the message for that specific audience. 3. Select the media

¹ Client listening activities I have observed include – 1. User groups; 2. Reverse seminars; 3. Attending client industry meetings; 4. Market research; 5. Senior partner visits; 6. Project team debriefings; 7. Systematic client feedback

² "Managing the Professional Services Firm". David H. Maister. 1993

you want the message to be read/seen/heard on. 4. Select the messenger you want to carry your message. The following breaks down the steps in a workshop format with a number of linked activities:



Figure 2 - Overview of Social Media Process

The approach outlined on the following pages highlights the objectives, mechanics, preparation and output associated with each suggested step.

Title	Objectives	Mechanics	Outputs	Preparation	Materials & Resources
1. Establish Social Media Goals	<ul style="list-style-type: none"> Clarify your businesses objectives & goals. What is your firm's purpose? Create social media marketing objectives & end goals (SMART). Align social media goals to business goals. 	<p>I. Consider your business goals & look to map them to social media activities e.g. raise brand awareness; be a thought leader; spread word of mouth; generate leads; generate sales</p> <p>II. Create SMART social media objectives e.g. we will grow out Facebook following by 20 new followers per week</p>	<ul style="list-style-type: none"> Clear <i>business objectives</i> – Increased client loyalty; Build brand & service awareness; Leads generated; Web referrals; Conversion rate; Revenue generated; thought leadership; build credibility & influence; reach audiences. List of social media <i>objectives</i> – reach, shares, likes, retweets, consumption, actions, conversion, push activity to website List of social media <i>goals</i> (how & when) – e.g. use twitter to drive 30 email sign ups per month. 	<p>Prepare sheets</p> <p>My objectives are:</p> <ol style="list-style-type: none"> <p>My goals are</p> <ol style="list-style-type: none"> 	<ul style="list-style-type: none"> Blog posts White papers Guides Social media posts

Title	Objectives	Mechanics	Outputs	Preparation	Materials & Resources
2. Audit your current social media presence and accounts	<ul style="list-style-type: none"> Conduct a social media audit and inventory of all your firms profiles. 	<ol style="list-style-type: none"> Create a spreadsheet and write down all the social networks you own and the owner for each Search on google for any other social presence & create another spreadsheet – shut down Y/N Evaluate social media profiles and need. Decide to consolidate or not Make sure all profiles are on brand Centralise ownership of login and passwords for all accounts Create process for creating new channels & who will evaluate request 	<ul style="list-style-type: none"> Completed spreadsheet - Channel; URL; owner; followers; last post; action. Mission for each profile e.g. Instagram share company culture and achievements On brand profiles – imagery; style; profile photo; cover image; icons; bio; description. Requester; target audience; type of content posted; who posts Mission statement for each network – one statement declaration 	<p>Prepare social media audit spreadsheet:</p> <ul style="list-style-type: none"> Social media site URL Followers Last activity date <p>Consider metrics:</p> <ul style="list-style-type: none"> Tweet impressions; Profile visits; Organic mentions; Follower growth; Conversion tracking 	<p>Social media audit spreadsheet</p> <p>http://www.bit.ly/KeoghSM Templates</p>

Title	Objectives	Mechanics	Outputs	Preparation	Materials & Resources
3. Know your target audience	<ul style="list-style-type: none"> Get an understanding of the target audiences – there may be multiple audiences. Create audience personas & map of audience. Get understanding of target audience's ordinary & social media activities i.e. the end user of your content. Understand what types of question you can answer. 	<ol style="list-style-type: none"> Brainstorm target segments – e.g. industry leaders; partners & peers; investors; journalists; owners; influencers; bloggers; individuals; buyers; brand advocates; suppliers; employees; colleagues. Customer discovery – have focus interviews Send out a survey to understand Review what they are looking at Ask is my audience here & how are they using the platform? 	<ul style="list-style-type: none"> List of overall target audience – Number, average age, % male, % female, % FB, % twit, % Linked, % Other 2 – 3 sentence buyer description for target market personas. Audience wants, needs, goals, pains List of content that can help clients 	<ul style="list-style-type: none"> Prepare brainstorming exercise Prepare focus interview Prepare survey 8 – 10 keywords to focus 	Post Its Markers Focus interview text Target Audience Spreadsheet Survey Google keyword planner – www.kwfinder.com Target audience spreadsheet.
4. Know the competition	<ul style="list-style-type: none"> Reverse engineer your competitor's strategy. Understand competitor's strengths and weaknesses. Review best practice from other sources. 	<ol style="list-style-type: none"> Review competitor and best in class accounts What content are they creating – what resonates? How often sharing What influencers are they interacting with? 	<ul style="list-style-type: none"> Competitor list overview Competitor channels; #followers; strengths; weaknesses; opportunities; content that resonates (likes) Who do they target? What do they share? 	Prepare list of top 3 – 5 competitors & international best in class firms – follow them	Database (Excel or Access) Competitive analysis template http://www.bit.ly/KeoghSM Templates

Title	Objectives	Mechanics	Outputs	Preparation	Materials & Resources
5. Optimise your presence	<ul style="list-style-type: none"> Create or improve your social media accounts to have maximum impact. 	<ol style="list-style-type: none"> Claim name & set up accounts Build great profile Report rogue accounts Delete accounts overrun with spam Add handles everywhere 	<ul style="list-style-type: none"> Holding page – Account on each platform Consistent look across platforms 	<ul style="list-style-type: none"> Pick name/handle Prepare visual branding Prepare text Assemble photos 	

<p>6. Develop a content strategy</p>	<ul style="list-style-type: none"> • Create a content marketing plan (mix). <ul style="list-style-type: none"> ◦ Why should the audience care? ◦ What are you offering? ◦ What's the call to action? • Create a social media content calendar (frequency)³. • Plan and schedule new content ahead of schedule. • Create great content. 	<ol style="list-style-type: none"> Audit existing content – look at what you have. What's still usable. What can be updated? What can be repurposed? What needs to be thrown out? What type of content? Who is target for each type of content? Create overview of major events and activities Keyword research How often will you post? Who will create content? How will you promote? Complete content plan Complete content calendar Brainstorm topics at end 	<p>Content plan:</p> <ul style="list-style-type: none"> • the type of original content that we will create and post is... • the type of content we will share is... • We will post to the following channels this frequently...x channels x times a day • The different audiences we will need to tailor content to are... <p>Editorial calendar⁴</p> <ul style="list-style-type: none"> • map out content release schedule and back to preparation schedule <p>8 – 10 keywords;</p> <p>Mission statement:</p> <ul style="list-style-type: none"> • purpose of content, who for, what you want to accomplish with <p>Social media content calendar⁵ that maps out promotion plan and timing of material preparation</p>	<ul style="list-style-type: none"> • Create a content calendar (excel) • Consider keywords • Prepare content plan template – week; network; content type; topic; copy; links • 1/3 promote business, convert reader, generate profit • 1/3 share ideas & stories from thought leaders • 1/3 personal interaction e.g. comments etc. • a) Critical/most required articles. b) Seasonal/time sensitive, c) Building articles (ground up) 	<p>Editorial calendar template (What & when it needs to be ready by):</p> <p>http://www.bit.ly/KeoghSM Templates</p> <ul style="list-style-type: none"> • Title; Author; Topic; Deadline; Publish Time; Notes. <p>Content release schedule (when you are going to do it).</p> <p>http://www.bit.ly/KeoghSM Templates</p> <p>Social media content calendar template – promotion plan.</p> <p>http://www.bit.ly/KeoghSM Templates</p> <p>e.g. planning text for twitter posts</p> <p>Curated content to share</p> <p>Keyword checker - www.kwfinder.com</p>
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Title	Objectives	Mechanics	Outputs	Preparation	Materials & Resources
			Brainstorm output – large list of topics, refined and scheduled by month.		
7. Measure progress	<ul style="list-style-type: none"> Understand who is reading responding and reposting your social media posts. Test, evaluate & adjust plan based on analytics. Evaluate v plan. 	I. Top performing content? Google analytics, Facebook insights, LinkedIn data etc. II. Simple metrics – most likes; most comments; most shares; most views; highest engagement. III. Least performing content? IV. Action required?	<ul style="list-style-type: none"> Follower growth Engagement (shares) Conversion #downloads Email signup, Qualified leads Updated goals Updated strategy 	Tracking report <ul style="list-style-type: none"> Date Net follower gain/loss Number tweets sent/posts Retweets/shares Likes Link clicks (bitly.com) Mentions Impressions Reach 	Set up google analytics and reporting templates. http://analytics.google.com Audit/Tracking spreadsheet http://www.bit.ly/KeoghSM Templates
8. Refine the strategy and adjust as needed	<ul style="list-style-type: none"> Review and update strategy. 	I. What worked well? II. What didn't work well III. Consider new goals for next period – 1. 2. 3. IV. Consider changes that will be made to the strategy.	New goals 1 2 3	Workshop for group review.	Workshop agenda Analytics Reports Flip boards etc.

³ A calendar can help you to be prepared for upcoming events, keep track of what worked and ensure that you have content planned. More details and examples at www.blog.hootsuite.com/how-to-create-a-social-media-content-calendar.

⁴ Editorial calendar is specifically for planning content assets such as articles, blog posts, video etc. i.e. a guide or structure for all the content that will be crafted to deliver on your strategic content marketing goals.

⁵ Social media content calendar is for planning content for social media e.g. text for twitter etc.

Title	Objectives	Mechanics	Outputs	Preparation	Materials & Resources
9. Ongoing listening to the market	<ul style="list-style-type: none"> Social listening programme. 	<ol style="list-style-type: none"> Set up Google alerts etc. Track brand names, handles, product names Track same for competitors. Track industry buzzwords. Track your slogan and those of competitors Track key people in company Track campaign names Look for branded hashtags and those of competitors 	List of: <ul style="list-style-type: none"> brand names, handles, product names. Same for competitors industry buzzwords your slogan and those of competitors key people in company campaign names branded hashtags and those of competitors 	Set up spreadsheet to track	Excel spreadsheet

About Keogh Consulting

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Should you require further information on how Keogh Consulting can help your project please contact us at bkeogh@keoconsult.com