Using Social Media In Marketing Strategy

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Course Description

Social media is changing how companies market their brands, products, and services in almost every industry. As a result, companies are going through fundamental changes with respect to how they interact with customers. Moreover, social media has made it extremely easy for customers to interact with (and influence) each other, which has critical implications for marketing strategy. Despite the widespread use of various social media platforms in the general population, as well as acceptance of such platforms as viable marketing channels in the business community, using social media for strategic marketing purposes is still relatively new. The challenge for marketers lies in identifying opportunities for encouraging, incentivizing, managing, and leveraging the social interactions that take place between companies and customers through social media in a manner that creates and/or enhances value. This course focuses on how to meet this challenge, with an emphasis on equipping you with relevant knowledge and perspectives on how social media can be incorporated into marketing strategy as a driver of value to both companies and customers.

Note that this course is not about the social media industry (i.e., the “business” of social media platforms) or specific social media platforms (e.g., Facebook, Twitter). We take the perspective that social media is a new digital marketing channel that, if used correctly, can be a strategic source of marketing value. The intention is to broaden your perspectives on social media marketing, not to narrow your thinking by having you focus on just a few platforms that happen to be popular at the moment. While these platforms are important and will of be discussed, you should know in advance that this is not a course solely about these platforms.
Objectives and Learning Outcomes

Social media has given customers louder voices than ever before. They are also now more socially connected, expect more from brands, and information can spread extremely quickly. In light of these important contextual factors, the overarching goal of this course is to help you get a clear perspective on what’s really going on in the age of social/digital/mobile so that you can start to see where the true value—to consumers, to managers, and to other corporate stakeholders—lies.

After successfully completing this course you should be able to do the following:

- Understand what social media is and how this new type of media and communications technology is impacting how business and marketing is done.
- Understand some key principles of “connected customers” from psychological and sociological perspectives, and how these principles can be leveraged when developing social media marketing strategies.
- Know more about the main social media tools available for business/marketing communication and some emerging “best practices” in using social media as a business communication channel.
- Know more about other, more innovative uses for social media in a variety of business areas and processes (e.g., new product development and service management).
- Know how to use various social media channels to publish and disseminate relevant branded content in order to engage an audience (e.g., customers) and to increase social impact, influence, and capital.
- Develop a strategic plan for identifying opportunities for using social media in a company.

Required Course Materials

There is no textbook for this course. The following online resources/blogs are essential reading on a regular basis in order to keep up with the latest news in the social media world:

TechCrunch:  http://www.techcrunch.com
Mashable:     http://www.mashable.com
Social Media Examiner:  http://www.socialmediaexaminer.com/

The technology sections of the NYT and WSJ are also relevant, as is Businessweek. You should also follow your professor on Twitter (@AndrewTStephen), because he frequently shares links to relevant content.
Workload and Method of Evaluation

The following table details the components of your grade and their weights.

<table>
<thead>
<tr>
<th>Item</th>
<th>Individual or Group?</th>
<th>Weight</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Social promotion exercise</td>
<td>Individual (Type C)</td>
<td>15%</td>
</tr>
<tr>
<td>2. Online case analysis surveys</td>
<td>Individual (Type B)</td>
<td>15%</td>
</tr>
<tr>
<td>3. Social media consulting project</td>
<td>Group (Type A)</td>
<td>40%</td>
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<tr>
<td>4. Class attendance and participation</td>
<td>Individual</td>
<td>30%</td>
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1. Social Promotion Exercise (15%)

This is a homework exercise that will have you go through the steps of developing a social promotion (e.g., a “special offer” promoted on a brand’s Facebook page). It will draw heavily on concepts related to viral transmission (organic and incentivized) covered in class. This exercise will involve some quantitative analysis (i.e., calculations done in Excel). This must be completed individually without discussion of concepts with classmates (i.e., type C). This is due at the beginning of session 3, 12:30pm on April 7, 2014. Details will be provided in class.

2. Online Case Analysis Surveys (15%)

Case studies will be used in most of the sessions. To prepare you must (1) read the case thoroughly and (2) complete an online survey about the case. Surveys must be completed by 5pm on the day before the corresponding class session (i.e., Sunday). Links to the surveys will be given approximately one week in advance via email and posted on Canvas.

3. Social Media Consulting Project (40%)

This is a group project that will involve you working in groups of 5 or 6 students with a company on a real social media marketing strategy project. Generally speaking, the scope of the project is to help a client develop a social media marketing strategy for their company/brand/product(s). The specifics will be discussed in the first class session and your client will provide a written briefing document (“the brief”). The emphasis will be on
identifying value-creating opportunities for using social media. You should expect to do at least some of the following as part of this project:

- Performing an analysis or audit of the current marketing situation for your client, particularly with respect to their advertising/communications and existing social media initiatives. Focus on what they have done and identify some challenges that you think could be overcome by using social media in some way.
- Identifying the best opportunities for using social media as part of your client’s marketing mix to help them achieve their overarching marketing and business goals.
- Developing clear objectives for a social media marketing strategy based on your audit (i.e., situation analysis) and the social media marketing opportunities that you identified.
- Articulating a social media marketing strategy designed to achieve these objectives. What is the theme and message to be communicated? Who are the targets? How will they be reached? What types of consumer-to-consumer social interactions will be relied on as part of this strategy? How will target consumers be encouraged to socially interact with other consumers to “spread the word”? What incentives will be offered? What ideas do you have for campaigns as part of this strategy? How will performance be measured and evaluated?

You do not have to implement anything. The focus is mostly on analysis and strategy development. The final deliverable is a presentation (i.e., a PowerPoint slide deck) that covers all the details of your analysis, proposed strategy, implementation plan, and supporting materials. You will present this in our final class session (session 6) on **April 28, 2014**. You will also need to present to your client (likely via conference call).

How often your team communicates with your client throughout the semester is largely your call. At a minimum, you must have three meetings (or conference calls) with your client:

- **Initial meeting.** This should take place no later than April 4, 2014. You and the client will discuss the brief. Your primary goal for this meeting is to clarify the client’s brief to the point where you have an understanding of their marketing objectives, their current situation, any challenges they face, and any preferences they have in relation to your project. Your secondary goal for this meeting is to work out the project logistics with the client (e.g., when do you next meet, can you email them with questions, do they have any background materials for you, etc). It is your responsibility to probe the client for details that will help you move forward. Before this meeting you should have an internal team meeting to decide on the questions to ask and to brainstorm some ideas (that you may want to share with the client to get a feel for what they like vs. don’t like). Be well prepared for this first client meeting!

- **Midpoint meeting.** This should take place no later than April 18, 2014. You will update the client on your approach to the project and your ideas so far. Your ideas should be sufficiently detailed so that the feedback you get is constructive. You may
want to send something to the client a few days in advance so they have time to look over your presentation. Your primary goal for this meeting should be to present a number of ideas/options to your client and have them indicate which one(s) they think are worth developing further into a more comprehensive marketing strategy.

- **Final meeting.** This should take place no later than May 2, 2014. You will take feedback received from your final presentation in class and have a final meeting with your client to wrap up the project and receive their feedback.

After the initial and progress report meetings you need to submit a brief (max. 1-2 pages) “progress report” memo to Dr. Stephen. This memo should give a summary of what was discussed in your client meeting, any issues you had, how they should be resolved, and what the next steps will be. This should be submitted by email. These memos will not be graded, however your group’s grade will be substantially reduced if you do not submit them in a timely manner.

4. **Class Attendance and Participation (30%)**

Much of your learning will come from discussions that we have during our class sessions. In each class session your goal should be to help foster a positive, open-minded, and learning-focused environment. You should try to make comments that advance the class discussion. Your contributions should help you and your colleagues learn. Quality is therefore more important than the quantity of your comments, though quantity is necessary to reliably judge the general quality of your comments to give you a participation grade. Remember, that you do not have to be right all the time (in fact, often there are no straightforward “right” and “wrong” answers). But do try to be intelligent! While attending class sessions is important, active participation is crucial. Please come to class ready to engage in discussions.

**Policy on Student Conduct, Academic Integrity, and Classroom Technology Use**

In addition to what is required of you by the Columbia Business School Honor Code, the following is expected of all students taking this course:

- Be on time for class.
- Attend all class sessions and actively participate in class discussions.
- Be prepared for class by doing the required readings.
- Respect all deadlines.
- Do not use electronic devices such as cell phones, tablets, and laptops during class sessions unless needed for a specific in-class activity.
About the Professor

Dr. Andrew Stephen is an Adjunct Professor at Columbia Business School and the Assistant Professor of Business Administration and Katz Fellow in Marketing at the Joseph M. Katz Graduate School of Business at the University of Pittsburgh. He teaches MBA- and executive-level courses in social media marketing and digital marketing analytics at Columbia Business School and the University Pittsburgh, and for universities in Europe and Asia. Prior to joining the faculties of Columbia Business School and the University of Pittsburgh he was a marketing professor at INSEAD in France and Singapore. His PhD is in marketing from Columbia Business School.

Dr. Stephen is a globally recognized expert on social media and digital marketing, and has worked with companies such as American Express, Colgate, Delta Air Lines, Dynamic Logic, Google, Kantar, Sanofi Pasteur, and WPP, and advises several social media-related startups. His academic research focuses on quantifying the marketing value of social media and understanding how consumers interact socially with each other through social media platforms and word of mouth. He has published in leading scientific journals such as Harvard Business Review, Journal of Business Research, Journal of Consumer Research, Journal of Marketing Research, Journal of Service Research, Marketing Science, and Psychological Science, and his research has been reported on in media outlets such as Businessweek, CNN, the Financial Times, Forbes, the Huffington Post, the International Herald Tribune, the New York Times, The Economist, the Wall Street Journal, and the Washington Post.

Class Sessions

Starting on the next page are details for each of the six class sessions. Note that these details are subject to change and will be confirmed/finalized prior to the beginning of the course.

Guest speakers have not been listed under each session. However, a number of guest speakers will come to the class from companies that provide social media marketing services (e.g., agencies), companies that use social media (e.g., brands), and companies that provide social media infrastructure (e.g., platforms). Details will be provided prior to the beginning of the course. In the past, guests have been executives from major companies operating in the social media marketing space.
Session 1, Monday March 24
Principles of Social Media Marketing Strategy

*Topics to be covered*

1. Course Introduction

2. Overview of Social Media Marketing
   - Introduction to the S.O.C.I.A.L. framework
   - Basic principles and key contextual factors

3. American Eagle Outfitters “Skinny Skinny Jeans” Case Study

*Preparation*

- Read the syllabus
- Follow the professor on Twitter
- Read the AEO Skinny Skinny case and prepare for class discussion by considering the following questions:
  - What could go wrong?
  - What could go right?
  - Would you have approved this?
  - How would you have done things differently?
  - What is the strategic value of this social media campaign to AEO as a brand, and to AEO’s core customer (females and males aged 15-25)?

*Deadlines/Deliverables*

- Form a group for the project (5-6 students per group). Email group list to the TA
- Complete the pre-class survey for the AEO Skinny Skinny case
Session 2, Monday March 31
Connected Customers, Social Transmission, and Viral Marketing

Topics to be covered

1. Customer-to-Customer Interactions and Social Transmission
   - Social interactions and social networks
   - Incentives for social transmission of branded content and information
   - Designing promotions to encourage social transmission/content sharing

2. Viral Marketing Campaigns
   - Strategic value of viral marketing
   - Key considerations when designing viral marketing campaigns and influencer campaigns

3. Ford Fiesta Movement Case Study

Preparation

- Read the Ford Fiesta Movement case and prepare for class discussion by considering the following questions:
  - Suppose you were designing this campaign. What are the three most important characteristics your “agents” should have?
  - What actions would you expect your agents to do throughout this campaign? How would you encourage them to do these things? Would you offer incentives, and if so, what would those incentives be?
  - How should the performance of this campaign be evaluated? Do you think it was a successful campaign?
  - How did this campaign generate value for Ford? What strategically valuable opportunities did it create?
  - What should Ford do next to build on this campaign? How can they create more strategically valuable opportunities and/or take advantage of ones they have already created?

Deadlines/Deliverables

- Complete the pre-class survey for the Ford Fiesta Movement case
- Reminder: you must have your initial client meeting for the project by Friday April 4 and submit your progress report memo to Dr. Stephen by email ASAP after this meeting
Session 3, Monday April 7
Social Media and Product Strategy

**Topics to be covered**

1. Products and Social Virality
   - Building products or designing features that people want to “talk about” to encourage social information transmissions
   - Network goods and externalities
   - Using incentive mechanisms to encourage transmissions to the “right” targets

2. Google Street View in France Case Study

**Preparation**

- Read the Google Street View in France case and prepare for class discussion by considering the following questions:
  - Suppose your goal is to increase the market share of Google Maps in France using Google Street View as a particular feature of the Google Maps product. Is focusing marketing on this particular product feature the best way to get attention and increase product usage? Why/why not? What are the alternatives?
  - Why did the first campaign (Tour de France) generate a substantial amount of “buzz” and increase unique users of Google Maps by 2.4%? What was it about this that was effective?
  - Why did the second campaign (partnerships with various organizations) also work well? How did it keep the “buzz” alive?
  - What value did these two campaigns create for Google in France?
  - What should Google do next to continue to improve its market position in France?

**Deadlines/Deliverables**

- Complete the pre-class survey for the Google Street View in France case
- Submit the Social Promotion Exercise at the beginning of this class session
Session 4, Monday April 14
Social Media, Innovation, and Insights/Research

Topics to be covered

1. Market Research, Customer Insights, Product Development, and Social Media
   - Using social media as a source of data on customers and as a means for generating valuable customer insights
   - Social media monitoring
   - Product development and innovation processes in relation to social media

2. DEWmocracy Case Study

Preparation

- Read the DEWmocracy case and prepare for class discussion by considering the following questions:
  - Is it a good idea to allow customers to be involved in product development in this manner (i.e., through an elaborate, multi-stage, social-focused program)?
  - What is the value to PepsiCo from this program?
  - Are these types of programs better for getting good ideas from customers or for making them feel more engaged with a brand?
  - What were the most important aspects of this program?

Deadlines/Deliverables

- Complete the pre-class survey for the DEWmocracy case
- Reminder: you must have your midpoint client meeting for the project by Friday April 18 and submit your progress report memo to Dr. Stephen by email ASAP after this meeting
Session 5, Monday April 21
Social Media and Customer Engagement

Topics to be covered

1. Social Media Content Strategy
   - Managing social media channels from a content publishing perspective
   - Characteristics of successful, engaging social media content

2. Customer Relationship Management and Service Management Using Social Media
   - Using social media to provide customer service
   - Managing relationships with customers through social media
   - Business-to-business marketing considerations

3. Delta Assist Case Study

Preparation

- Read the Delta Assist case and prepare for class discussion by considering the following questions:
  - Why is Delta Air Lines doing this? What’s the value proposition to the company?
  - Why do customers like this? What’s the value proposition to customers?
  - How do customers use this? You can take a look at some public tweets yourself by going to twitter.com/DeltaAssist
  - What would customers expect in terms of response times and the nature of responses?
  - Send a tweet to @DeltaAssist asking a question (you could pretend to be traveling if you want to!). Note how long it takes to get a response, the type of response, and whether or not you were satisfied.

Deadlines/Deliverables

- Complete the pre-class survey for the Delta Assist case
Session 6, Monday April 28
Client Project Presentations and Course Conclusion

Topics to be covered

1. Group Client Project Presentations
   - Each group will present their client project to the class
   - Details about timing, format, etc will be discussed closer to this session
   - The most important thing is that you get to share your knowledge and ideas with each other, as well as receive constructive feedback

2. Future of Social Media and Course Conclusion
   - Discussion of some new and important trends in social media and how they can potentially be used for marketing purposes

Preparation

- Think about a new social technology, website, platform, or similar that you think has potential to be “the next big thing” and how it could be very useful and effective as a strategic tool for generating marketing value

Deadlines/Deliverables

- Final presentation for client project. Email your slide deck to the TA before the start of this session
- Reminder: you must have your final client meeting for the project by Friday May 2