

Incorporating Social Media into a Technical Content Strategy

White Paper

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Introduction

We've encountered a growing number of companies and information-development organizations that have a presence on social media, believing it's a critical and beneficial method for engaging customers. But we've also heard stories of social media efforts gone awry and the resulting wasted time, money, and personnel resources, or worse, the embarrassment and damage to a company's reputation. We wanted to find out more about the advantages social media offers to technical communication teams, the characteristics of successful social media implementations, how to avoid the pitfalls, and the effort that it takes to integrate such a program into an existing organization. So late in 2013, the Center for Information-Development Management (CIDM) conducted a study consisting of a survey, interviews, and a review of social media practices.

Selected Survey Responses

PARTICIPATING COMPANIES AND ORGANIZATIONS

The participating companies in the study represent a strong cross-section of industries, corporate sizes, and business goals. The top three industries represented are enterprise software, consumer software, and telecommunications. Large multinational corporations made up the majority of survey participants, but there was some representation from smaller companies.

INDUSTRIES PARTICIPATING IN THE SURVEY

The majority of respondents were from enterprise software, with two-thirds from that space. Consumer software was next, followed by telecommunications. Enterprise hardware and consumer electronics companies made up the rest of the respondents. In general, many of the products represented by the respondents are highly-configurable, and customers often face unique situations that require specific information. In the past, those requests for information were typically handled through phone-based customer support. Phone-based support is costly for the vendors, often not quick enough for customers, and single-threaded, addressing one customer and issue at a time. Based on the level of interest generated indicated by participation in the survey, it is possible that companies are looking to use the immediacy of social media to have more open support-related conversations on a broader scale (Figure 1).

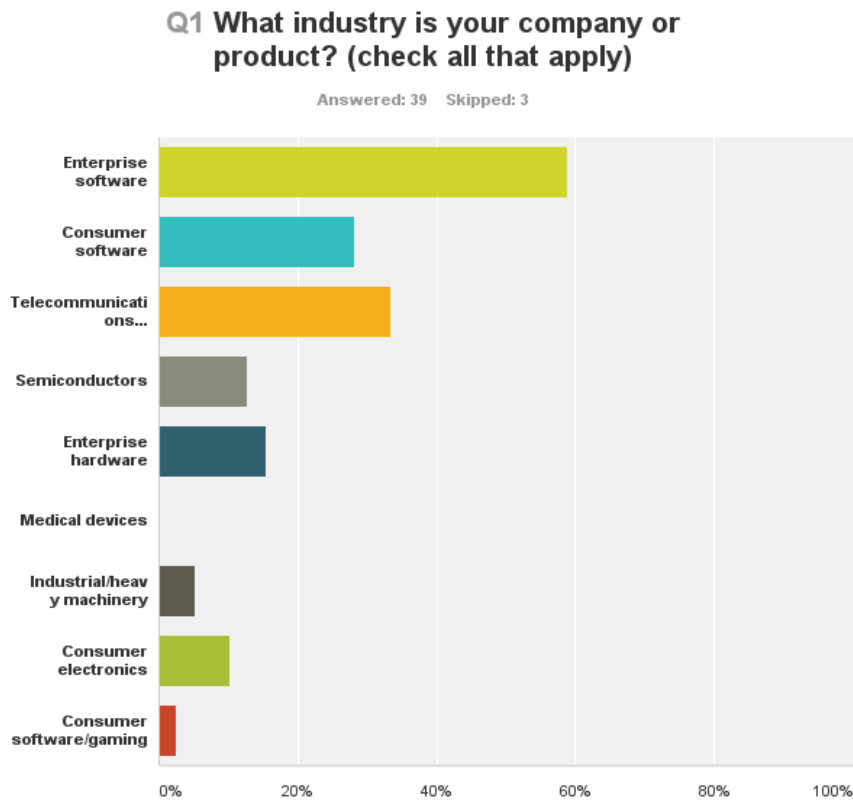


FIGURE 1: INDUSTRIES PARTICIPATING IN THE SURVEY

COMPANIES THAT HAVE A SOCIAL MEDIA CAMPAIGN FOR TECHNICAL CONTENT

Two-thirds of respondents either had a social media program or were researching the possibility of establishing one. The use of social media for technical content appears to be in transition from the early adoption phase to the early majority phase. While a small percentage of customers engages in social media for technical content, those customers are influential, and actively recruit their peers to engage. Accordingly, customer participation is on the rise and the use of social media for technical content is becoming expected. Technical communication teams that ignore social media are at risk of being left behind by competitors (Figure 2).

Q2 Does your company have a social media campaign for technical content?

Answered: 42 Skipped: 0

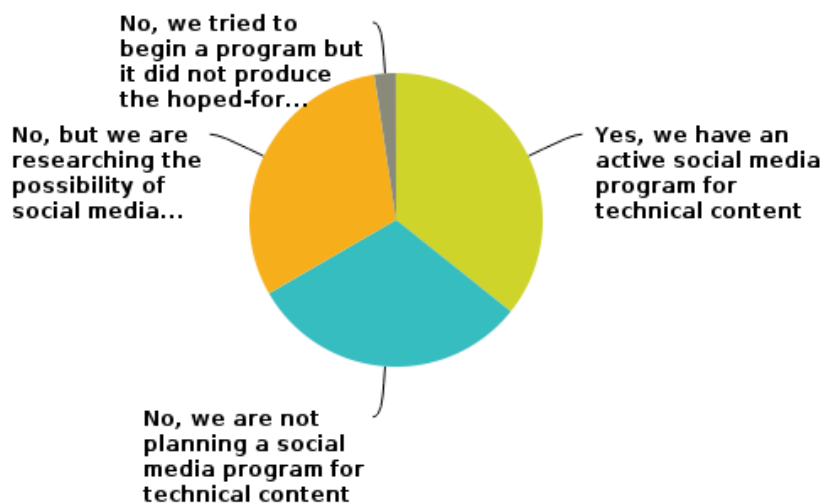


FIGURE 2: COMPANIES THAT HAVE A SOCIAL MEDIA CAMPAIGN FOR TECHNICAL CONTENT

REASONS FOR NOT HAVING A SOCIAL MEDIA PROGRAM

The companies who do not have or are not planning to use social media are still determining how best to engage customers for meaningful dialogue about technical publications. Only a few think that social media is not worth the effort. For marketing departments, the use of social media is well established and in majority use. However, the broad impact of social media on marketing communication seems to have influenced the perception of its usefulness and applicability to technical content. Many respondents feel that social media is reserved for sales and marketing functions by policy or practicality. They are missing an opportunity to interact with customers in a powerful and ongoing manner. Finally, for many technical publications departments, not participating in social media is a matter of resources. It appears that they have not been able to add or shift resources appropriately to make the most of customer contact (Figure 3 on page 6).

**Q3 If no, why do you not have a social media program for technical content?
 (check all that apply)**

Answered: 21 Skipped: 21

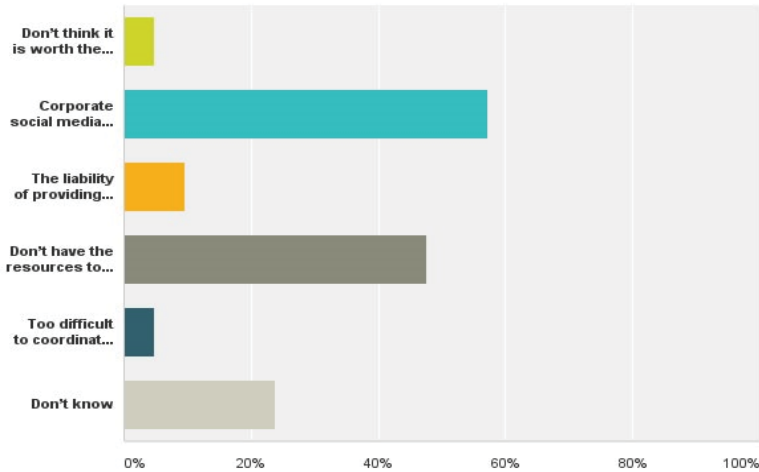


FIGURE 3: REASONS FOR NOT HAVING A SOCIAL MEDIA PROGRAM

REASONS FOR HAVING A SOCIAL MEDIA PROGRAM FOR TECHNICAL CONTENT

Most companies with an active social media program in the study cited several reasons, including broadcasting announcements and links to content as well as soliciting feedback and participating in conversations to solve customer problems directly. In broad terms, the range of responses indicates that information-development teams are using social media both to push content to users and to pull in user feedback and content. Social media is a natural method for conversational interaction with users and customers. Typically, content is pushed through social media announcements with links to documentation sites and wikis where customers can then post comments, suggestions, and additional content (Figure 4).

**Q4 If yes, why does your company have a social media program for technical content?
 (check all that apply)**

Answered: 20 Skipped: 22

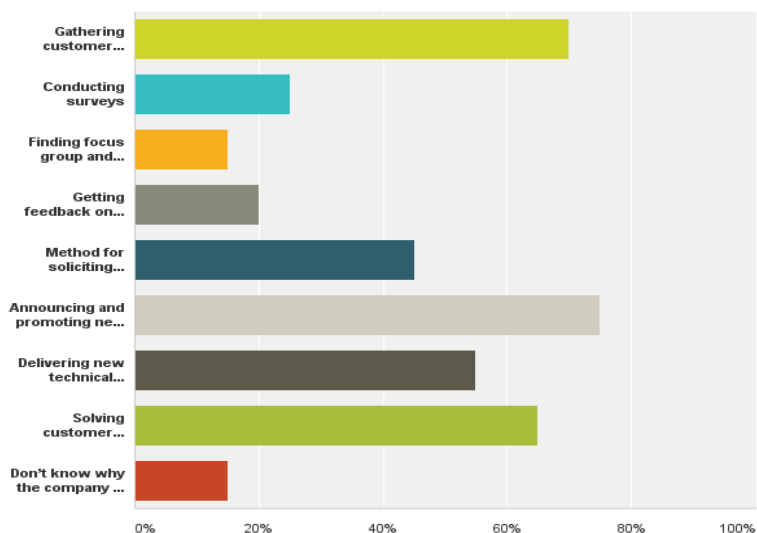


FIGURE 4: REASONS FOR HAVING A SOCIAL MEDIA PROGRAM FOR TECHNICAL CONTENT

SOCIAL MEDIA SITES USED

The majority of respondents were from North America, and the responses correspond roughly with the overall North American usage statistics for each social media site. Twitter and Facebook were the most widely used. YouTube also proved to be a popular tool, indicating that video is a useful medium for demonstrating highly technical content (Figure 5).

Q7 What sites does your organization use as part of its social media program for technical content? (check all that apply)

Answered: 27 Skipped: 15

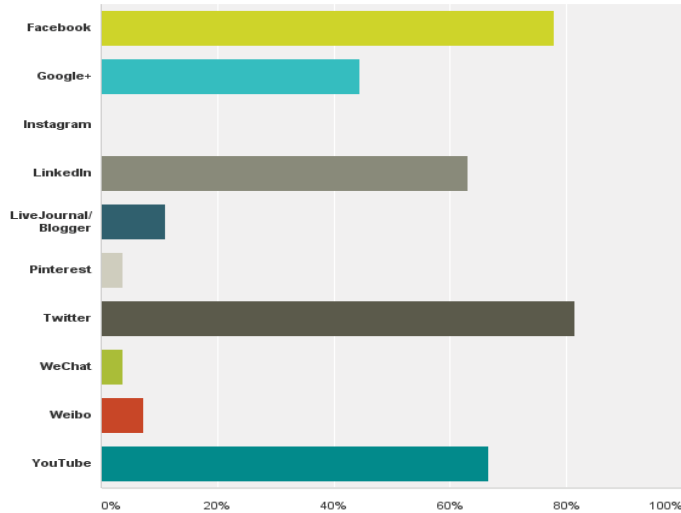


FIGURE 5: SOCIAL MEDIA SITES USED

FREE TOOLS USED TO MONITOR AND ANALYZE SOCIAL MEDIA SITES

There were few responses to this question, which is surprising given the ubiquity of social media in the lives of customers. Some teams with active social media programs are not collecting site metrics at all. Possible reasons for the lack of metrics are resource constraints and a lack of knowledge regarding the types of metrics to gather and the tools available for gathering them. The lack of metrics gathering represents a lost opportunity to make the most of social media (Figure 6).

Q8 What free tools/applications does your organization use to monitor and analyze the social media sites? (check all that apply)

Answered: 14 Skipped: 28

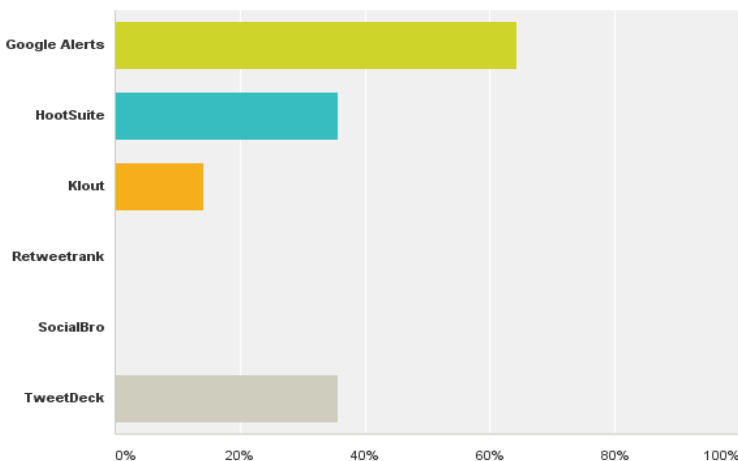


FIGURE 6: FREE TOOLS USED TO MONITOR AND ANALYZE SOCIAL MEDIA SITES

COMMERCIAL TOOLS USED TO MONITOR AND ANALYZE SOCIAL MEDIA SITES

Half of the respondents indicated that social media monitoring is outsourced. This possibly indicates uncertainty about the appropriate metric to use to measure ROI (Figure 7).

Q9 What commercial tools/applications does your organization use to monitor and analyze the social media sites? (check all that apply)

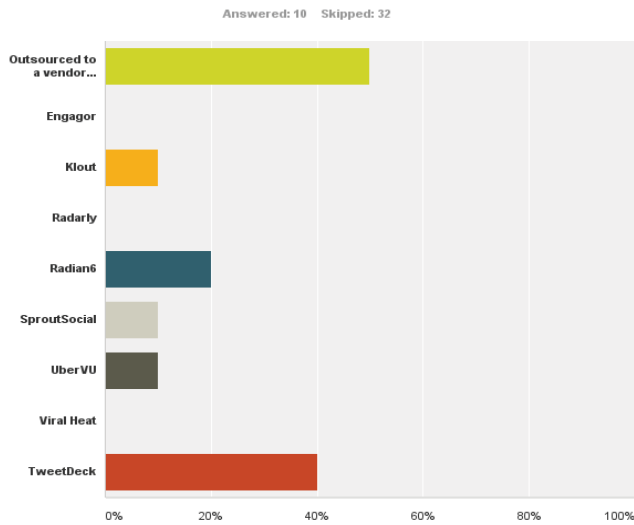


FIGURE 7: COMMERCIAL TOOLS USED TO MONITOR AND ANALYZE SOCIAL MEDIA SITES

TRANSLATION OF SOCIAL MEDIA FOR TECHNICAL CONTENT

Many of the respondents come from multinational companies with business around the globe. Further analysis is needed to determine if the lack of translation is due to funding, expertise or global customer interest. It may be a potential lost opportunity (Figure 8).

Q13 Do you translate your social media for technical content?

Answered: 28 Skipped: 14

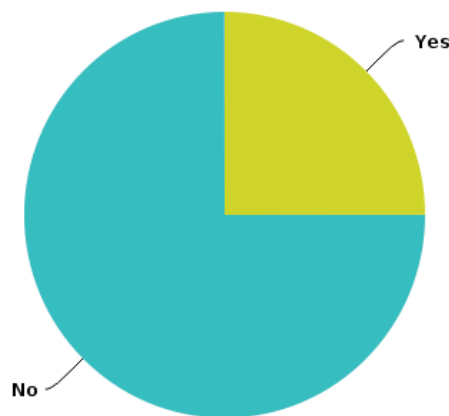


FIGURE 8: TRANSLATION OF SOCIAL MEDIA FOR TECHNICAL CONTENT

REASONS CUSTOMERS VISIT SOCIAL MEDIA SITES FOR TECHNICAL CONTENT

Getting the most up-to-date content is expected, but the response also affirms the trend towards participation in a user community. While the overall percentage of customers who visit the sites is low, those that do visit are among the most zealous customers who value the content and participation in the community (Figure 9).

Q14 What do you feel is the biggest motivator for your users to visit your social media sites for technical content?

Answered: 23 Skipped: 19

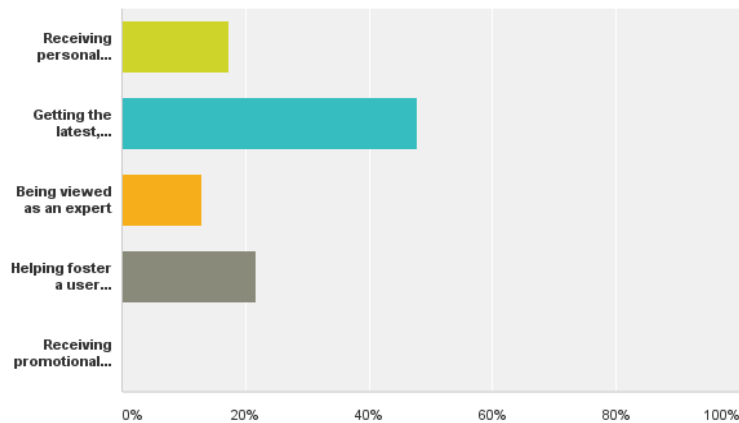


FIGURE 9: REASONS CUSTOMERS VISIT SOCIAL MEDIA SITES FOR TECHNICAL CONTENT

CHALLENGES OF INCORPORATING SOCIAL MEDIA

The responses suggest that a social media program must generate user interest and maintain that interest to be effective. The time and resource commitment to help generate content and develop a community can be challenging. Often the social media communities take time to establish, so it may take a year or more of concentrated effort to recruit enough customers to make the social communities self-sustaining with customers who will share technical content, hints and tips, and opinions (Figure 10).

Q16 What are your biggest challenges when incorporating social media?

Answered: 28 Skipped: 14

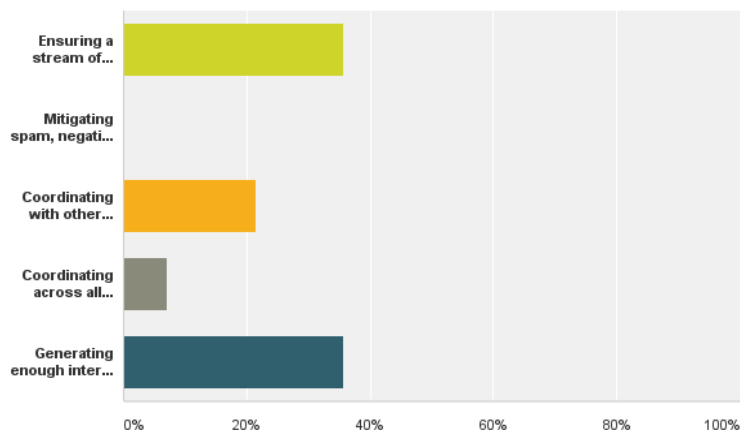


FIGURE 10: CHALLENGES OF INCORPORATING SOCIAL MEDIA

INFORMATION DEVELOPERS MONITORING SOCIAL MEDIA

Over half of the respondents indicated their writers did not have the time to dedicate to social media. The lack of engagement certainly seems to be a lost opportunity. A planned and focused social media program allows writers to have direct and ongoing contact with customers, something that information-development teams have long expressed as important to understanding customer needs. Information-development managers should explore defining the social media goals and prioritizing customer contact so that other, less-important tasks are minimized, freeing up the writers to monitor social media and interact with customers (Figure 11).

Q17 Are your information developers asked to monitor social media sites?

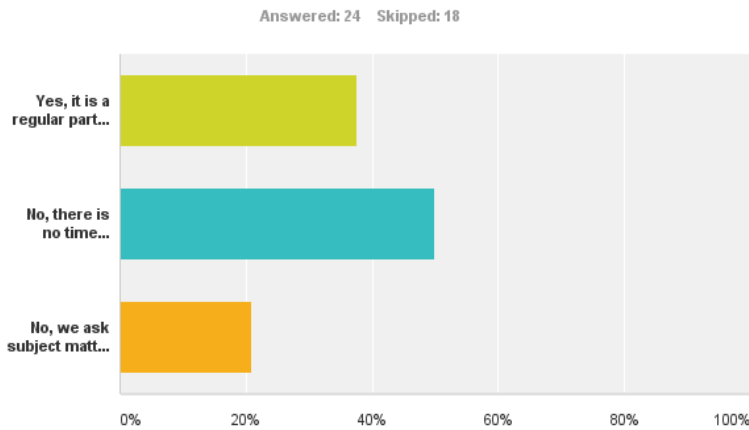


FIGURE 11: INFORMATION DEVELOPERS MONITORING SOCIAL MEDIA

SUBJECT-MATTER EXPERTS CONTRIBUTIONS TO SOCIAL MEDIA SITES

The response is consistent with the earlier question regarding participation rates for information developers. Time (and therefore money) is an important consideration, as is setting proper goals and expectations and prioritizing activities. The integration of social media into the responsibilities of employees is still evolving (Figure 12).

Q20 How do you engage your company's engineers and subject matter experts (SMEs) to actively contribute to the social media site for technical content?

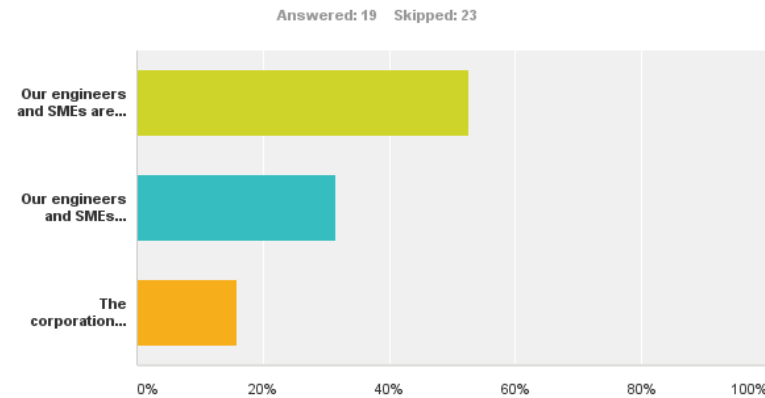


FIGURE 12: SUBJECT-MATTER EXPERTS CONTRIBUTIONS TO SOCIAL MEDIA SITES

ORGANIZATIONAL RESPONSIBILITY FOR SOCIAL MEDIA SITES FOR TECHNICAL CONTENT

Information-development teams are taking a greater responsibility for monitoring social media sites, indicating that teams are beginning to establish useful connections with customers. While several departments monitor social media, follow-up discussion revealed that only a few employees in each group actually interact with users in those media. As social media practices mature, expanding the responsibility to interact with customers to all employees is likely (Figure 13).

Q21 What team monitors the social media sites for technical content (check all that apply)?

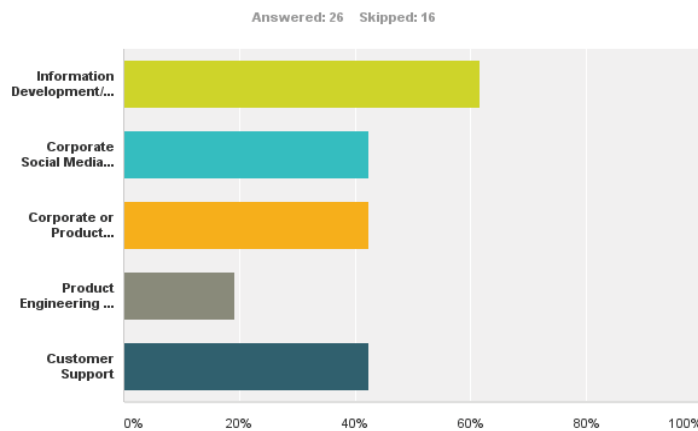


FIGURE 13: ORGANIZATIONAL RESPONSIBILITY FOR SOCIAL MEDIA SITES FOR TECHNICAL CONTENT

EFFECTIVENESS METRICS FOR SOCIAL MEDIA

Direct interaction with customers received a high response rate and may contribute to the increased customer satisfaction with the technical content. One of the difficulties cited in maintaining a social media program is community participation and customer contributions, so it is interesting that those are not considered an important measure of effectiveness. However, direct customer interaction was cited by over 40% of respondents, indicating the usefulness of communicating directly to the customer base. Some respondents looked for evidence of increased satisfaction through “likes,” survey responses, and brand promotion through recommendations on social media (Figure 14).

Q22 How do you measure the effectiveness of your social media program?

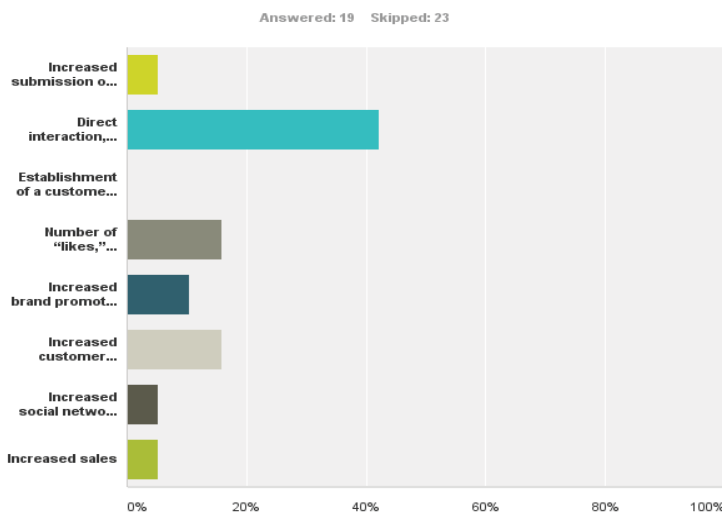


FIGURE 14: EFFECTIVENESS METRICS FOR SOCIAL MEDIA

Findings

In addition to hosting the social media survey, CIDM researched the social media postings for technical content that were publicly available on various social media sites. After viewing the results of the survey, we followed up with interviews of technical communication organizations who are actively engaged in social media. We combined the results of the research and interviews with those of the survey to put together these findings

Social media is an excellent way to engage with users and collect valuable information about their needs. Information-development departments are beginning to realize the potential of social media to engage customers. Traditionally, many information-development groups have struggled to make contact with their users. The efforts to establish relationships and communicate with customers typically relied on methods such as site visits, observations, and user surveys. Engagement with customers through social media, while not a replacement for other methods, has the potential to establish actionable, long-term customer relationships on a large scale.

CONNECTING WITH CUSTOMERS THROUGH SOCIAL MEDIA

While fewer than half of the companies responding to the survey have an active social media program, those that do are seeing significant benefits. The companies who do not yet have a social media program are responding to those positive results, with two-thirds of those surveyed either engaging in social media or investigating its use.

Social media is an effective tool for interacting with customers and learning about their information needs. In this capacity, social media addresses the most common complaint that we hear from organizations that develop technical content: that they don't know their customers and don't have the ability to interact with them. Social media obliterates the barriers between technical communicators and customers. In fact, the effectiveness of social media programs is often measured by direct customer feedback and involvement in improving technical content.

Consider this invitation to share information posted by IBM. Providing a success story and asking about further problem-solving situations is a powerful way to engage with customers and document both their needs and know-how (Figure 15).

Some 6 months later in Dec 2010 I had a customer with six AIX servers running at 95% utilization and all from remote TEMS processing. I was able to present a solution quickly. However the customer was unconvinced. I wrote a Perl program to summarize the results in a spreadsheet file. The customer was convinced, made the changes and those six systems dropped to 10% utilization. In March 2011 I published the process and tool as a technote and it is now widely used.

Recent changes

TEMS Audit continues to be enhanced as new issues are encountered. The technote as documentation became unwieldy so I reworked it as an install guide and a usage guide. All the recent changes have been documented and are included in the program objects below. The advisory messages are of special note since it points to specific issues or alternatively states there is no issue identified.

Versions:

Here are recently published versions, In case there is a problem at one level you can always back up.

1.19000

ProcessTable Summary, listen pipes. "No Matching Request" error summarized, Nofile advisory, improve -z option processing

1.10000 - last technote version

Advisory section. 16meg truncation warning

Summary

Identify and correct workload and configuration problems. I encourage anyone to share success stories, enhancement requests or problems found.

FIGURE 15: CONNECTING WITH CUSTOMERS

ESTABLISHING WARM, COMPETENT RELATIONSHIPS WITH CUSTOMERS

Customer interaction works best when there is a personal connection. Customers are most forthcoming when they trust the individuals and organizations they communicate with. That trust is built on respect and professionalism, but also on connecting on a personal level. In *The Human Brand*, authors Chris Malone and Susan T. Fiske introduce the concept of warmth and competence. They cite research that shows that all humans quickly judge their interactions based on two questions: "What are the intentions of this person toward me? And how capable are they of carrying out those intentions?"

Establishing and maintaining warmth and competence through social media takes considerable effort. Technical communication teams that have an effective social media program set standards and assign responsibilities for monitoring sites, responding to customers, and incorporating the changes requested and contributed by customers into the company-produced technical content. Two of the companies interviewed made sure each of their information developers set aside 2.5-5 hours a week to dedicate to social media. Following through on promises to improve content is extremely important, as is continuing to communicate with customers throughout the process. That effort takes time and a commitment to be responsive. The expected turn-around time with social media is often measured in minutes rather than hours or days. Teams must provide coverage globally and ensure someone is available to monitor and respond to customers during holidays and off hours. One company asks for volunteers from around the globe to be available from home during holidays.

RAISING AWARENESS BY PUSHING CONTENT TO CUSTOMERS

Social media sites are often used to broadcast new technical content in a one-way direction. This “pushing” of content often consists of a tweet or a Facebook post that contains a link to a newly released piece of content or to a chunk of existing content that is relevant to a request or an ongoing social media discussion. Many customers are not fully aware of the technical content that is available to them. Using social media to push announcements and links helps them find the relevant information and sets the stage for them to comment on what’s available and request changes, updates, or additional information.

In the following example, IBM uses Twitter to provide a link to updated documentation. This is a classic one-way push of information to help customers find existing resources (Figure 16A).



FIGURE 16A: PUSHING CONTENT TO CUSTOMERS

Alcatel-Lucent also pushes announcements regarding documentation updates (Figure 16B).



FIGURE 16B: PUSHING CONTENT TO CUSTOMERS

MAKING IMPROVEMENTS BY PULLING CONTENT FROM CUSTOMERS

Two-way communication through social media is frequently used to “pull” content from customers in the form of user-generated content and feedback and commentary on the documentation, either through public media sites or directly on the documentation website.

In this example, Nokia uses Twitter to engage and collaborate with their users. As soon as a customer tweets about a problem, a Nokia Care expert provides the answer on the same channel (Figure 17 on page 15).

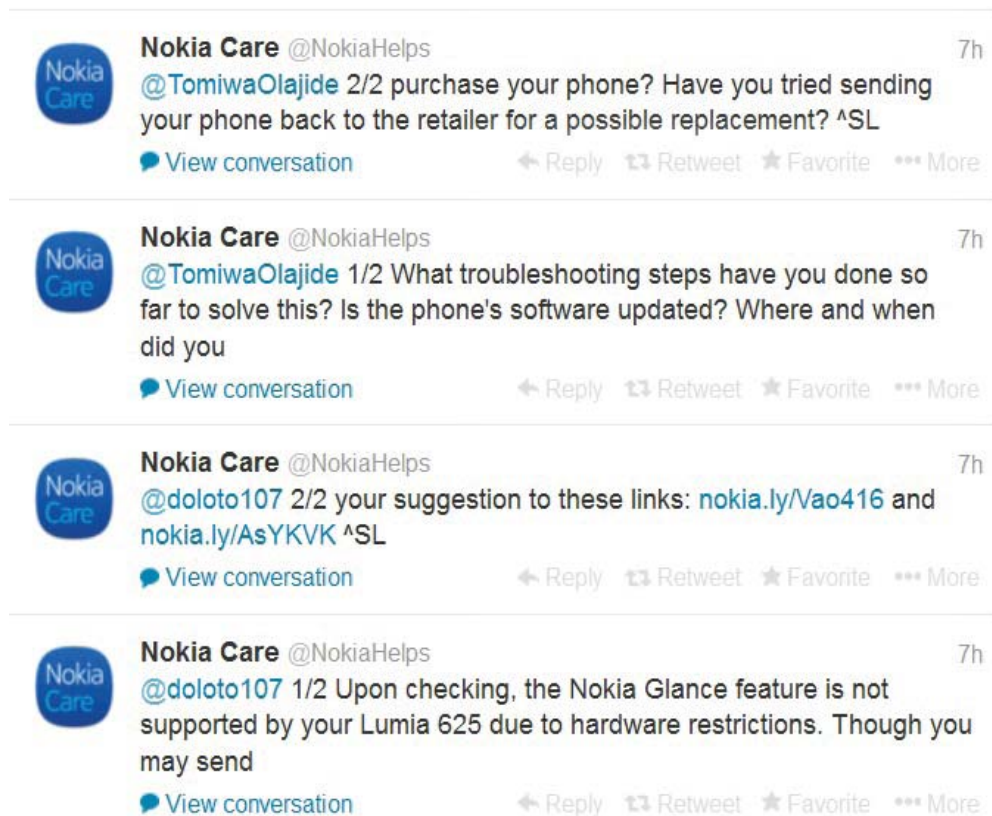


FIGURE 17: PULLING CONTENT FROM CUSTOMERS

The most effective two-way communication initiatives are actively managed. For example, one participating company spent two weeks soliciting qualified community members to take part in creating new content. The technical communication team provided interactive guidance as the community developed new solutions for each stated goal. In another example, a participating company used collaboration software to maintain an ongoing conversation between users and employees regarding its products and the information needs of the customers.

MONITORING AND ENGAGING IN SOCIAL MEDIA

The study revealed that there is no consistency regarding which business unit or functional team manages the social media program. Typically, social media accounts are decentralized and match either the organization of a company or the geographic diversity of its customers. This decentralization provides an opportunity for technical content teams to participate in social media. However, it increases the complexity and difficulty of establishing a consistent corporate persona.

The survey results suggest that teams should dedicate time for monitoring and participating in social media. The survey revealed that while most information-development teams are often tasked with the responsibility to monitor social media, only a minority of individual information developers within those teams are asked to monitor social media sites. Those respondents noted that there is not enough time for all employees to monitor social media, even if they are subject-matter experts.

USING PUBLIC SOCIAL MEDIA SITES

The social media sites that are actively used are Facebook, Google Plus, Twitter, LinkedIn, and YouTube. A few of the companies interviewed indicated they find video a useful medium for demonstrating technical content, and they have active YouTube channels for distributing narrated walkthroughs.

Twitter is especially popular for pushing out announcements regarding newly available content and links to existing content. The ability for customers to retweet information to their own followers helps announcements spread quickly to a targeted audience. The following Twitter exchange regarding Samsung's Customer Support Android app shows how quickly customers can spread the word regarding documentation resources (Figure 18).

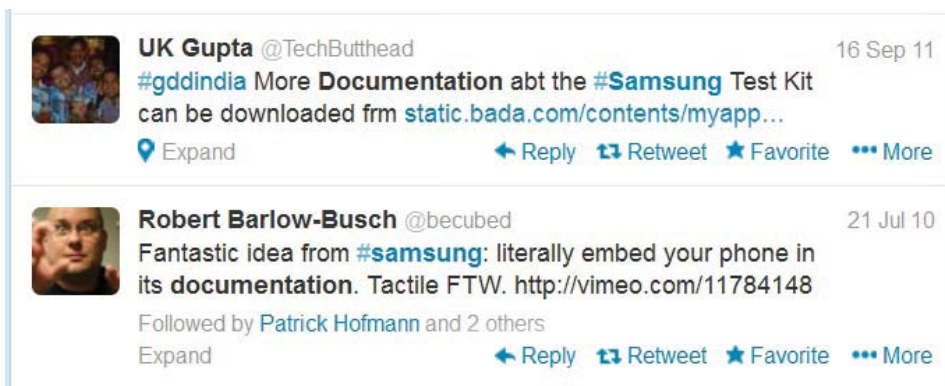


FIGURE 18: USING PUBLIC SOCIAL MEDIA SITES

USING PRIVATE FORUMS, WIKIS, AND COLLABORATION SITES

While some teams use public social media sites, many companies choose more tightly controlled interaction with their customers through support websites, user forums, wikis, and collaboration sites that require sign-in and verification. By limiting access these companies gain assurance they are dealing with paying customers and gain more control over the environment than if they were communicating through a public social media channel.

Forums, wikis, and community sites are popular for publishing and maintaining technical documentation and gathering customer comments on it. Having a private community creates an atmosphere of trust where both the company and its customers can be more forthcoming with regard to customer needs, product requirements, product direction, and collaborative problem-solving. The two-way conversation through the collaborative sites is much more like an open conversation. The insights can be particularly valuable in such situations if there are enough members to solicit interesting topics and to keep the conversations moving along.

Microsoft uses Wikis to engage customers in understanding the product and involve them in providing articles of interest to the Microsoft Community. Consider these examples (Figures 19 & 20):



FIGURE 19: MICROSOFT WIKI—EXAMPLE 1



FIGURE 20: MICROSOFT WIKI—EXAMPLE 2

USING TOOLS EFFECTIVELY

The software tools used in social media can be sorted into a few logical categories:

- ◆ Social Media Monitoring—The tools provide a dashboard to monitor multiple social media sites at the same time and provide a mechanism to analyze and respond to users in those media.
- ◆ Wiki and how-to site generation tools—Wikis permit two-way interactions with customers and often provide an easy mechanism to modify content and monitor use.
- ◆ Collaboration tools — The tools offer a variety of functionality that facilitates collaboration both internally and with customers. The output of internal collaboration can be published as a wiki or standard web page, which allows external users to offer comments and collaborate to improve the content itself.

While information-development departments are learning that they should actively monitor social media and engage customers, they are often unsure of the best tools, processes, and metrics. There are a wide variety of monitoring tools available, and the survey and interviews confirm that none has become an industry standard. A surprising percentage of survey respondents are not gathering any social media metrics at all. Several companies have opted to outsource the task of gathering metrics instead of handling it in-house, relying on external experts to interpret the data.

The interviews confirmed that wikis and community sites are a popular mechanism to publish and maintain technical documentation. Several of the wiki tools also provide full collaboration capabilities. Current wiki-creation software permits customers to comment on or modify content and provides customized output (in multiple formats) that is accessible through mobile devices. Commonly used wiki tools include Telligent, Zendesk, SuiteShare, and a variety of open source options.

Collaboration tools offer the widest variety of functionality, often monitoring social media sites and allowing users to comment on and modify content. The most capable tools allow collaboration between internal and external users (employees and customers) and use the output of that collaboration to publish technical content. The market leaders in collaboration include Jive, MindTouch, Confluence, and Brightidea WebStorm.

ACKNOWLEDGING THE CHALLENGES OF SOCIAL MEDIA

Survey respondents and companies interviewed feel they need to improve upon the following:

- ◆ Incorporating social media into the day-to-day activities of the information developers
- ◆ Generating continued customer interest and ensuring relevant content flow
- ◆ Providing governance and coordinated control of social media programs
- ◆ Translating social media sites: only 25% of companies are translating content

Recommended Best Practices

The results of the survey, interviews, and examination of current social media practices revealed a few practices that were consistent among successful initiatives. In many ways, establishing a social media initiative is like any other large project; establishing the business objective and a strategy to meet that objective is essential. Quantifying the goals and identifying metrics are also necessary to track success. And like any broad initiative, clearly delineating areas of responsibility as well as setting standards for content and response time are extremely important. Finally, social media efforts must be given adequate time and effort to succeed. Successful initiatives involve all of the content creation staff, who are expected to integrate social media into their day-to-day lives. Conversely, those initiatives that have failed are merely given lip-service, with no priority or importance given to the activities. Invariably in such situations, other priorities take the place of social media, and the community withers.

The recommended best practices for using social media for technical content are as follows:

- ◆ Establish a social media strategy
- ◆ Set proper governance and standards
- ◆ Establish both one-way and two-way communication
- ◆ Use tools and infrastructure to monitor social media

ESTABLISH A SOCIAL MEDIA STRATEGY

Establishing an overall strategy is a crucial first step. With the number of social media outlets available, the ability to obtain the desired results can become difficult without focused coordination among participants. Top-down design of the social media strategy should contain a business plan outlining the goals, cost of activities, expected benefits, and the measurements to be used.

The most successful measurements for social media initiatives include the customer satisfaction with the technical content, the number of customers participating in social media, the frequency of customer participation, and the number of positive comments from customers. These success factors can lead to a decrease in traditional support costs. However, when setting goals, be aware that participation may be low, especially in the early phases of the program. Participation and results also depend on the demographics of the industry, especially on the age demographic of major clients.

SET GOVERNANCE AND STANDARDS

The need to develop a governance policy is essential. Participation in social media is not without risk. Poorly executed exchanges with customers can spread virally throughout the communities and marketplace and damage the reputation of the company. Social media is powerful and must be handled carefully. Each interaction, whether a short tweet, casual post on Facebook or Google+, or YouTube posting should be considered with the same care as a traditional content release and publishing. Establish what social media will be used, what interactions will take place, who will be responsible, and what they will need to do explicitly.

The information-development organizations must coordinate their activities with any centralized activities of the enterprise. The governance and standards policy should document how the program will be coordinated with marketing, sales, support, and service. It should record when SMEs in other organizations will be solicited to help and what their responsibilities will be. The extent of customer access should also be agreed upon. Best practices for customer access include a progressive exposure to content and discussion activities based on whether the customer is a registered user, a qualified prospect, or the public.

ESTABLISH BOTH ONE-WAY AND TWO-WAY COMMUNICATION WITH CUSTOMERS

Best practices reveal that information-development organizations reap the most rewards when they engage customers on multiple channels. Organizations must be aware, however, of overextending their reach. Poorly monitored accounts leave a bad impression with customers and can undermine successes in other channels. Base the participation with a particular channel on the goals defined in the business plan and the estimated effort to ensure focused results.

Social media channels are used by information-development teams for two main purposes:

- ◆ Distributing announcements and snippets of content to customers to raise their awareness and encourage their participation in the social media communities and to take advantage of new products, features, and content. Twitter, Facebook, and YouTube are the most effective channels for distributing content and links to customers.
- ◆ Establishing a two-way conversation between and among customers and the company, encouraging customers to share knowledge about the product with each other and developing insights into their goals, tasks, and opinions on enhancements to the product and technical content. Company forums, wikis, and Twitter are the most effective channels for establishing customer conversations.

RESEARCH APPROPRIATE TOOLS AND INFRASTRUCTURE TO MONITOR SOCIAL MEDIA

Engaging customers through social media requires understanding what social media they use and how they use it. Technical communication teams should leverage existing information about customers' social media preferences. If such information does not exist, teams should consider a survey or study to determine what customers would find most effective.

Teams establishing social media initiatives should also investigate tools that make monitoring social media sites easier for information developers. Monitoring tools aggregate and analyze content, allowing information developers to respond to multiple social media channels and conversations from a central location and gather usage statistics. Wiki tools help both information developers and customers contribute content quickly and easily to online communities. And collaboration tools combine some of the features of the previous categories, providing analytics, organizing content, and enabling interactive comments, posting, and publishing for an enhanced collaborative information set.

Tools purchases should not be made until the goals of the social media strategy are clear and the results of the social media customer survey are analyzed.