GET BOLD

Sandy Carter

IBM Vice President,
Social Business
Evangelism

Using Social Media to Create a New Type of Social Business

"For crying out loud, IBM 'gets' social media. Don't you think it's about time that you do? This is the book to get you started."

—Guy Kawasaki,
author of *Enchantment*

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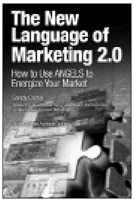
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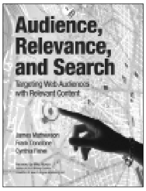
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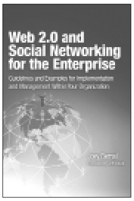
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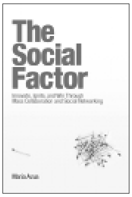
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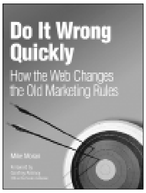
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Praise for *Get Bold*

"For crying out loud, IBM 'gets' social media. Don't you think it's about time that you do? This is the book to get you started."

—**Guy Kawasaki**, author of *Enchantment: The Art of Changing Hearts, Minds, and Actions*

"Sandy Carter has not just written a book, she has set a standard. *Get Bold* is NOT an option, it's an imperative. It's a book to be embraced, studied, and implemented."

—**Jeffrey Gitomer**, author of *The Little Red Book of Selling* and *Social BOOM!*

"Sandy Carter is spot-on in *Get Bold*. IBM has understood for years that this social networking thing meant more than sharing pictures of funny cats. *Get Bold* speaks in a language that will satisfy the stodgiest of CEOs but with a passion that belies the importance of these tools for these times."

—**Chris Brogan**, president, Human Business Works

"Looking for unparalleled innovation and improvements to the way your organization operates? In *Get Bold*, Sandy Carter demonstrates how leveraging powerful collaborative tools will transform your business into a vibrant Social Business."

—**Marcia Conner**, Social Business Industry Analyst and coauthor of *The New Social Learning*

"Sandy gets it. It is all about Social Business and social media, the transformational forces in the world today! Her examples are global and applicable with lessons to help you get started fast!"

—**Loic Le Meur**, founder of LeWeb, #1 social media and technology event in Europe

"Outstanding!!!! Sandy Carter, Women in Technology Hall of Famer, writes about Social Business in a way that you can just 'get it.' Sandy is a talented social media expert—who really understands the business side of technology."

—**Carolyn Leighton**, founder/chairwoman, WITI (Women in Technology International)

"This breakthrough book gives marketers a path to making the entire organization customer-centric using social media with real case studies and strategies for significant ROI. Most importantly, it provides the arguments you need to convince senior management that all departments in the organization must ride the wave together or your company risks getting lost out at sea."

—**Roy Young**, president of MarketingProfs, coauthor of *Marketing Champions*

"*Get Bold* is not another book full of buzz words that describe social media. It provides a clear blueprint for developing strategies that leverage social media to deliver tangible business results. If you want to create a social enterprise, you need to read this book!"

—**Tony O'Driscoll**, executive director, Center for Technology Entertainment and Media, Fuqua School of Business, Duke University

"For years now, companies have been watching the growing popularity of social networking and asking themselves whether this is something they should pay attention to. In *Get Bold*, Sandy Carter urges companies to leverage social media to unlock the intellectual capital within their organizations, paving the way for unprecedented innovation and becoming a new type of Social Business. Her book is based on her experiences helping IBM become a world-class Social Business and working with clients around the world and across industries to help them do so as well. Sandy offers the readers of *Get Bold* an action-oriented Social Business agenda to help them get started today."

—**Irving Wladawsky-Berger**, strategic advisor, IBM and Citigroup; and visiting faculty, MIT and Imperial College

"At this moment, we are on the verge of the largest shift in the communications landscape in the history of mankind. For the first time ever, companies can communicate with their constituents in ways never before possible. This more connected and engaged way of doing business, Social Business, will transform the way business gets done well into the next century. In Sandy Carter's new book, *Get Bold*, Sandy illustrates what leading companies are doing to transform their business around a framework to chart their own path to Social Business success. As a core partner of IBM's on Social Business, we'd encourage you to pick up this must-read!"

—**Jeff Dachis**, CEO of Dachis Group, who coined the phrase "Social Business"

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SANDY CARTER

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To my bold family.

Personally, I could not have done this without my husband, Todd, and my two angel daughters Cassie and Maria. I dedicate this book to them!

In addition, I dedicate this book to:
My parents, who have inspired me my whole life—
this book reflects them!

My brother, who is my protector!

My in-laws, who have become my cheer squad!

My business family, including IBM and my clients
and partners—the best in the world!

"Other things may change us, but we start and end with family." –Anthony Brandt

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Foreword— Business Is Personal

"Business is personal." That's one of the first things I learned as a freshly scrubbed college graduate with no real working experience. Develop relationships with people, both inside and outside of the company. To get work done, you also have to get to know the people you work with. Remember important details, but more than just the superficial facts of birthdays and spouse's name—get to know them as people.

But I have a confession to make: I'm lousy at remembering these kinds of details. So I was an early user of "personal data assistants" (PDAs) and clicked my heels the first time I laid eyes on a CRM system.

But that is nothing compared to the transformation of what social networks have done for my business life. When I receive an email from someone, I automatically see the person's LinkedIn or Facebook profile, and if available, their latest tweets. This information provides me with the lifeblood of business data: context.

In fact, each time I visit a site or store, I run a good chance of running into someone I "know" because that site has enabled services like Facebook Connect to import my friends into the experience. Rather than reading every review on Amazon, or seeing comments from every person on Huffington Post, I can filter to see only reviews and comments from people I know, namely, my friends. Even search is changing—Google and Microsoft's Bing integrate social signals into search results from around the world.

In a nutshell, social networks and your friends on them are becoming like air. These personal relationships appear where and when you need them, rather than being locked away only on social sites like Facebook, Twitter, LinkedIn, and YouTube.

The impact for business is that you have to be like air as well, and be anywhere, anytime your customers, employees, and partners need and want you to be. I'm talking about you personally as a businessperson, and also "you" as a company entity.

This is the foundation for why it's important to transform you and your organization into a Social Business—because this is what will be required of you to be competitive and successful in the future. More than anything else, businesses that can harness being social and being personal, and that can extend that to every corner and person of the organization, will have a significant advantage. That's because they will make business personal in a way that traditional organizations will struggle with.

If you have picked up this book and are already reading this Foreword, you tend to fall into one of two groups. Either you are a believer and want to get on with it, or you are still trying to figure out if, when, and how you will get started being a Social Business. If you are in the first group, a believer, skip the rest of this Foreword and get going with Sandy's great content! But if you are in the second, let me give you an inkling of the road ahead of you.

The title of this book is *Get Bold.* You will need to be bold for the journey ahead of you because you are moving into unchartered territory. There are no easy answers to crucial questions like the ROI of Social Business or the road map of how to get started. But you could not be in better hands than those of Sandy Carter, who has been at the front lines working with hundreds of companies big and small, all around the world. You won't get all of your questions answered—no book could ever do that. But you will find this book a crucial resource as you embark on your journey.

Bon voyage, and get bold!

—**Charlene Li**, Author of *Open Leadership* and Founder of Altimeter Group

Foreword— The New Transformation: Social Business

As we entered the twenty-first century, the business world found itself facing significant change. The introduction of the Internet had ushered in a new era of opportunity and productivity—in fact, the magnitude of this shift was not unlike the changes that spurred the Industrial Revolution a century earlier. And while the Industrial Revolution was bringing big change to business—like unprecedented gains in manufacturing capability, new factory technology, and automation—it was having a similar impact on society, bringing prosperity to an emerging middle class in developing nations such as the United States. The "Information Revolution" of the twenty-first century is also bringing a new middle class forward, this time in places such as China and India. However, this time around, it's enabling work to move seamlessly around the globe, integrating people, processes, and content in new ways. The technologies of the Internet have fundamentally changed how business works and the speed at which it operates.

This wasn't completely clear in the late 90s, however, when many businesses were struggling with the confusion of the dot.com boom (and bust). What would the lasting effects of the Internet be? It was obviously on the scene for good, but by then we'd already seen that by itself it wasn't necessarily a guarantee of business success. Companies created websites just for the sake of getting on the Web, when they needed to question how the new technology could make their businesses more efficient, without destroying them. How would intellectual property be contained, and would employees spend their days surfing the Net? In many cases, the Internet-led business transformation ended up remaking many industries—such as publishing and advertising, to name a couple.

Today, we've seen the Internet evolve from a vehicle for simple content publishing, to a platform for commerce, to a way to connect people, and now finally to an "Internet of things" as mobile devices, electronics, and even appliances become connected to the Web. The concept of researching information and buying goods and services over the Web has now become second nature. In a relatively short period of time, the rise of social media has evolved from a way to share music and files to a fundamentally new way for people to interact with one another. Recent events have shown the power of the technology to play a key role in fundamentally remaking entire governments, thus changing the course of history. So once again, the Internet has issued business with a new challenge. As with the confusion we faced a decade ago, we need to understand how to harness these technologies to become more efficient, transforming both our business processes and our mind set.

Social networking has the potential to unlock the intellectual capital within organizations, to connect experts and expertise, and to pave the way for unprecedented innovation. For example, organizations that have tapped into the power of social tools are able to link their developers or researchers, no matter where they're located, to enable collaborative development that spans the boundaries of geographic borders or time zones. Developers then have the ability to easily exchange ideas and share input, sparking new innovation and allowing development to happen at a faster pace—speeding time to market.

Beyond facilitating collaboration, applying "social" technologies to business processes has the potential to radically improve the way organizations operate. For example, social tools enable human resource teams to identify and catalogue talent and expertise, linking people with the right skills with the right opportunities, when and where they're needed. Plus, HR teams could tap into these social networks to "sense" employee morale or target potential climate problems, proactively responding before issues escalate. This fundamentally changes the way the function works within an organization.

It also reveals the untapped power of the "data" generated by these connections. Organizations are no strangers to data; it's exploding at an incredible pace. And 80% of this data is unstructured—like the data from social networks, which could take the form of a conversation among customers on a message board. This represents a daunting challenge for any organization trying to learn from it or use it to make decisions. Fortunately, new types of analytics engines are helping companies to make sense of this data, unlocking an invaluable asset. By "instrumenting" the social networks inside and outside of your organization, interconnecting the key data they create, and applying analytics, you're able to gain insight into things such as the general attitude toward your brand and customer preferences, and even gain headlights into their buying behaviors. And using this insight, you can make more intelligent business decisions.

Sandy Carter explores these issues in the following chapters, discussing what it means to truly take advantage of these new technologies to improve the way your business runs. As the Vice President of Social Business and Collaboration Solutions Sales and Evangelism, Sandy has studied this issue very closely for IBM—but more than that, she represents a great, first-hand example of how social technology can be applied in a business setting. Embracing social tools very early on, she is now one of the top bloggers at IBM, as well as one of the most followed people on Twitter. In this book, she shares some best practices so that you and your company can truly take advantage of the monumental opportunity that's at stake.

Social technologies are already causing big changes in business, and companies are already seeing results. This book is a compelling and comprehensive look at the steps you can take to ensure you don't miss out.

—**Mike Rhodin**, Sr Vice President, IBM SWG Solutions

Preface

Of the three books I have written, I believe this is my favorite one. Why? I am passionate about social media and Social Business. It is more personal because of my daily use so I am excited to share my point of view with you!

The bottom line is that this book represents my loves:

- **My love of market transformation:** I seek out transformation. Today we are on the edge of the next "big" one. Companies around the world are now focused on becoming Social Businesses. A Social Business has a first-mover advantage since this transformation is about not technology but people. Relationships take time, not just money, and not just technology.
- **My love of learning:** Because this is a new area, I love working with those companies pushing the edge. Inside these covers are more than 70 client best practices.
- **My love of doing:** I have been "doing social" since 2005 and have experimented with it inside my teams as well as externally. The last six years of leveraging these social tools and techniques have energized me and taught me things I could not have learned without doing. I am not just a student of becoming social but a practitioner. I love sharing the lessons I learned from my successes but also my mistakes.
- **My love of *bold* action:** The title of this book is *Get Bold*. Bold is the ability to take a risk, manage the risk, and be confident in the outcome. People who know me know I have a bent for action. This book is designed for your company to create your own Social Business AGENDA so that you can be BOLD in this new world!
- **My love of the never-ending story:** My favorite quote is from an old Indian Proverb: "Tell me a fact and I'll learn. Tell me a truth and I'll believe. But tell me a story and it will live in my heart forever." This book is just a start. I continue to learn from my colleagues, peers, clients, and partners. Please follow my "living" story on my blog (http://socialmediasandy.wordpress.com/) and my Twitter account (http://twitter.com/sandy_carter).

Organization of This Book

This book is organized around a best-practice-adoption model. It is not about technology but about the way to get started with goals, culture, trust models, and governance structures.

Chapter 1, "The AGENDA for Social Business Success," is about understanding what a Social Business is and its characteristics, as well as expected business outcomes like competitiveness.

Chapters 2 through 7 outline the necessary steps to complete your company's own Social Business AGENDA. Based on working with thousands of clients, the book outlines the steps and process for creating your personalized Social Business AGENDA:

> **A: Align your goals and culture.** You need to take this step to be ready to become more engaging and transparent. Do not underestimate the task ahead of you. Culture eats strategy for lunch. Take a look at IBM's Social Computing Guidelines as a way to get started!
>
> **G: Gain social trust.** This focuses on finding your fans, friends, and followers, and forming best friends from your tippers or most influential clients or outside parties. It dives into what social trust is all about and how you instill it.
>
> **E: Engage through experiences.** This part of the process focuses on how a company can engage its clients and employees and dives into gaming; virtual gifting; and location-based, mobile, or other stellar experiences to drive that engagement.
>
> **N: "Social" network your processes.** Since this is about business, figuring out how to add social techniques to your processes is critical. Think about customer service—adding in Twitter to address your customers' concerns. Or try crowdsourcing for product innovation, or communities for incrementing your marketing processes around loyalty!
>
> **D: Design for reputation and risk management!** This is the number one area of focus for the C level—managing the risk of having your brand online, your employees being your brand advocates, and even your clients becoming your marketing department! I think the value outweighs the risk . . . but see how to develop a disaster recovery plan as you plan for the worst, and expect the best!
>
> **A: Analyze your data!** Social analytics are the new black! You need to see the patterns of sentiment, find out who your tippers are, and listen daily!

Chapter 8, "Technology as a Competitive Ingredient," focuses on understanding the basics of the technology and a framework to enable you to use these important tools to drive your success. Technology is definitely a critical part of your success.

Chapter 9, "Draw Up Your AGENDA," provides a showcase of complete Social Business AGENDA case studies with a summary on each workstream your company will need to complete.

Based on feedback from my great reviewers, I added a "Glossary of Social Business Terms." Because this is a new area, it helps to have this information handy. In fact, I use it almost daily now with my teams!

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ENJOY!

Sandy

Acknowledgments

This story would not have been possible without the help of many people:

First, God, who blessed me with creativity and a love of all things social!

Second, my family: Todd, Cassie, and Maria, who supported my weekends of writing; my parents, who inspired my bold ideas; my brother Gary's love and support; and my in-laws, who cheered me on!

Third, key members of my review team who were deeply involved through all stages of the book: Liz Markiewicz, Kathy White, Ted Stanton, Jennifer Dubow, Judith Hurwitz, Roy Young, and Patricia Santamaria.

Fourth, a set of mentors to lead the way, including Jeffrey Gitomer, Charlene Li, Irving Wladawsky-Berger, and Guy Kawasaki, who all taught me and shared their experiences freely.

Fifth, my customers for the great sharing of their learnings: 1-800-FLOWERS, Amazon.com, American Eagle Outfitters, Apple, Arrow ECS, Ascendant Technology, AT&T, Austrialian Open, Avery Dennison, BASF, Blendtec, Blue Cross Blue Shield of Massachusetts, Boston Medical Center, Cars.com, Caterpillar, Celestica, CEMEX, China Deaf Association, China Telecom, Coach, The Coca-Cola Company, Colgate-Palmolive, DeepMile, Dell, Deutsche Lufthansa AG, Domino's Pizza, Dr. Pepper Snapple Group, Elegance II Energizer, Fabergé, Farmers Insurance, Farmers Insurance University, Ford Motor Company, Forrester Research, Gap, Gatorade/PepsiCo, gDiapers, Godiva Chocolatier, GoMidjets, Harley-Davidson, History Channel, The Home Depot, Honda, Indium Corporation, Jerry Pozniak@TheDryCleaner, Kenneth Cole, Kinaxis, Kraft Foods, Manulife Financial, Meteor Solutions, Mob4Hire, Moosejaw, Mountain Dew/PepsiCo, National Football League, Newell Rubbermaid, Practising Law Institute, Pratt & Whitney, Price Chopper, ProChile, Procter & Gamble, Quantum Storage Systems, Richard Scott Salon and Day Spa, RobustCloud The Salvation Army, Sennheiser Electronic GmbH & Co. KG, Sogeti, Southern California Edison, Southwest Airlines, Starbucks, Taylor Guitars, Teach for America United Airlines, US Open Tennis, uTest, Virgin Atlantic, Visa, Volkswagen, Volvo, The Walt Disney Company, and Zappos.com.

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Finally, my new friends at Pearson Education: Mary Beth Ray, Chris Cleveland, and Betsy Harris. Thanks for all your great advice and support.

About the Author

Sandy Carter is Vice President, Social Business Evangelism, in which capacity she is responsible for helping to set the direction for IBM's Social Business initiative. Social Business is a more than $200 billion marketplace.

Her career history is impressive. She has been a Chief Marketing Officer, Chief Sales Officer, Chief Software Alliance Officer, Business Leader, and Strategist who has successfully leveraged social techniques to drive business success. She and her teams have been awarded more than 25 social media awards for her innovative and successful implementation of Social Business techniques.

In 2011, Women in Technology inducted Ms. Carter into their Hall of Fame for the impact she had on the social media and Social Business marketplace. Fast Company named Ms. Carter one of the most influential women in technology, and Everything Channel's *CRN* magazine named her one of the 100 most powerful women in channels in 2010 and 2009.

Ms. Carter is the best-selling author of two books: *The New Language of Business: SOA & Web 2.0,* which won the Platinum MarCom Award in 2008, and *The New Language of Marketing 2.0: How to Use ANGELS to Energize Your Market,* which won the Silver MarketingSherpa award in 2009. Ms. Carter received MarCom awards for her blogger and Twitter communities and for the 2010 Business Partner Virtual Event. She has also been recognized by World Brand Congress as 2009 Brand Leader of the Year, and by Altimeter Group as one of the top 10 women in social media.

She was honored twice with the AIT United Nations Member of the Year award for helping developing countries in the area of technology. Ms. Carter is listed in Madison's Who's Who and the Cambridge Who's Who. She was named Best Speaker by Baptie & Company for receiving the highest speaker rating at the Baptie 2010 Channel Focus North America/Latin America conference. AlwaysOn named Ms. Carter to the Top 25 Women in Tech to Watch list in 2010.

Ms. Carter holds a Bachelor of Science degree in computer science from Duke University and an MBA from Harvard, and is fluent in eight programming languages. She received a patent for developing a methodology and tool to help customers create a technology deployment path in automation of their IT processes.

Visit her best-rated blog at http://socialmediasandy.wordpress.com/ and her Twitter account at http://twitter.com/sandy_carter.

CHAPTER

6

Design for Reputation and Risk Management

“Your online reputation is your Social Business Currency. Manage it well.”

Sandy Carter

“What happens in Vegas
might stay in Vegas,
but odds are
there’s footage.”

Unknown

Reputation and Risk Management

As I began my research into reputation and risk management, I found many organizations that experienced some sort of crisis in the blogosphere while trying to protect their online reputation. For example, United Airlines had to deal with a crisis with David Carroll's Taylor guitar, which was broken during a flight he took. Because he felt he had not been treated well, he wrote a song about what United had done, and posted it to YouTube (www.youtube.com/watch?v=5YGc4zOqozo). At press time, there were more than 10 million viewings. Taylor Guitars also produced a YouTube video with 500,000 viewings offering support to David, and offering tips to those traveling with Taylor guitars. By the time United did come back and offer to reimburse David, he asked for United to give the money to charity. United Airlines stock plummeted 10%, costing shareholders $180 million dollars, for a $1,200 claim on a guitar! And United isn't the only company faced with these challenges. Consider a few others:

- Dell's support was attacked online with a lead blogger calling it "Dell Hell." Dell handled the situation well, and in fact, listened and created a great solution called IdeaStorm.
- AT&T's poor service for iPhones caused the FCC to step in on a plan from one disgruntled tweeter to shut down AT&T's network.
- Energizer's Night Race 2011, held in Sepang International Circuit, Malaysia, was not well organized. Although the race was only sponsored by Energizer, when negative comments on Facebook appeared, Energizer's brand took a hit by not responding quickly and apologetically, and an alternate site, Boycott Energizer Night Race, took a very aggressive stance against Energizer.
- Honda promoted its Facebook page, seeking input on its new Accord Crosstour design. Most people were critical of the design, although on Facebook a fan seemed to like it, writing *"Interesting design, I would get this car in a heartbeat."* It was later found out that the "fan" was the product planner for the Crosstour. Even though Honda issued an apology, the media did write about the story and of Honda's lack of transparency.

I strongly believe that every Social Business needs to expect the best, but plan for the worst. Planning for your reputation online is a relatively new concept. People have been focused on reputation management offline for a while, but only recently has this focus included the online world. In fact, I discussed this concept with many Fortune 100 HR directors, and they are now hiring many more reputation managers versus risk managers into their companies! A risk manager focuses on what to do when something goes wrong. A reputation manager focuses on protecting the brand, product, or company in a proactive stance.

What is reputation management? It is ensuring that a company knows what is being said about it, building it up through positive actions and having a way to address the negative comments online, and sooner rather than later. Reputation is what others believe to be true about your company, product, or brand. Reputation management is being able to appropriately shape that reputation by

- Listening to know what others think about you
- Countering negative opinions
- Building positive opinions through actions

Much has been said regarding the proliferation of social comments. With so many social tools and such wide scope and content, it is available to everyone and is extremely impactive. What is even worse is that the Internet does not have the same authoritative standards as do traditional media. For example, a newspaper and news channel will often check their facts and do some investigative study before going public. In the blogosphere, you can't count on that level of investigation, and thus it can be difficult to understand whether information is valid or just one person's biased opinion.

But what's different from the media explosion of television and radio some 50 years ago is both the sheer volume, speed, and influence. About 770 million people have visited a social networking site, according to comScore. (comScore is an Internet marketing research company providing marketing data and services to many of the Internet's largest businesses. comScore tracks all Internet data on its surveyed computers in order to study online behavior.) According to Forrester Research, four out of five online U.S. adults use social media in some capacity (source: "Benchmarking Social Marketing Plans For 2011," by Sean Corcoran with Emily Riley, Angie Polanco, October 14, 2010). Furthermore, according to the GlobalWebIndex, over 70% of those in the U.K. leverage social media. It is this power of influence and massive distribution that make social such a potent force in influencing consumer perceptions. In fact, 78% of consumers trust their peer's recommendations—whether good or bad.

It is this volume of content, distribution, and influence that is reshaping how Social Businesses manage their reputation and manage risk that might occur in their relationship to brands, products, services, and issues of the day.

I recently read the "Elements of Reputation" by Arlo Brady. Based on his research, reputation is built from the following:

1. **Knowledge and skills:** A company is only as good as its employees, who are the major determinant of current and future success.
2. **Emotional connections:** Consumers attach emotions to services and products; without this emotional connection many companies would be alike.
3. **Leadership, vision, and desire:** Stakeholders attach a high value to companies that are perceived to be led by a group of people who have vision and desire.
4. **Quality:** This concerns product or service quality, that is, whether a company is seen to be meeting customers' requirements, not just once but consistently.
5. **Financial credibility:** This is the traditional means by which a company's performance is judged. To build credibility, the company should have a strong historical and contemporary record for generating better-than-average returns for shareholders.
6. **Role of the company in the society and community:** People care that you care about bigger things than just profit—that you value helping people.
7. **Environmental credibility:** Given the green movement, companies that focus on the environment tend to have better reputations as citizens value the planet. A Smarter Planet by IBM demonstrated our focus on the planet as much as profit.

These seven items provide a guide for what to watch carefully. Reputation must be managed closely in order to decrease the potential for elements that downgrade the reputation. In fact, if you think about Chapter 5, "(Social) Network Your Business Processes," many of these seven reputation earners are inherent as you socially enable your internal processes. For example, facilitating sharing of talent and subject matter expertise by socially enabling your HR process can impact your knowledge and skills.

Any of the aforementioned seven elements could come under attack at any time, however. In fact, the number one question that I get asked from the C suite is about the "risk" of being so public online. The risk exists even if your company is not proactive online, because clients, influencers, and competitors can write about your company at any time. That is why, despite these risks, IBM's Chief Marketing Officer, Jon Iwata, said the rewards outweigh the risks:

> "We discovered that the risks of *not* encouraging employees to engage in social media and the risks of *not* providing them with the tools and education they need greatly outweigh the risks [of trained participation]. Our assessment has provided

> even more evidence that encouraging employees to engage in social media is critical to our future success as a business."

How do you manage risk in the social world? The primary elements in managing risk associated with your reputation are first in knowing you have an issue, and then in addressing it in a speedy and transparent fashion with the right people. This chapter outlines best practices to protect your online reputation and manage the risk associated with the blogosphere.

The rewards of becoming a Social Business far outweigh the risk, however, but not without careful planning and management. In fact, to me, the bigger risk is that your company will create an online presence and no one will come! As with any relationship, it takes work to make it strong. The sections that follow explore how to plan for recovery, while outlining the great rewards that come with a Social Business.

Managing Your Reputation with a "Plan" to Reduce Risk

The goal of your Reputation and Risk Management Plan is to avoid the need for a recovery, but to be ready in case one happens. The following simple 1-2-3 steps can prepare you for the worst but ensure that you are growing and building your online reputation as well:

1. Listen.
2. Create your brand army.
3. Create a response plan.

1. Listen: Do You Know There Is an Issue?

In C. S. Lewis's book *The Lion, the Witch and the Wardrobe,* the light of a lonely lamppost in the forest guides Lucy through the wardrobe into the fantasy world of Narnia. In Social Business, listening acts as a guide, through the vast magical and interesting world of the blogosphere. Listening is about monitoring what is being written (or said or videoed!) about your company, brand, or product. It can even include the category that your product is in, for instance, sports drinks or IT companies.

Listening is mandatory for building your reputation, not just when things go wrong but for understanding about your reputation drivers as well. Listening well can help you avoid any social business disaster from occurring.

The value of proactive listening is that it also assists you in understanding your prospects, clients, and, of course, competitors. It leads to action and awareness of conversations that will compel your company to respond. Because your URL isn't just your website anymore, but everywhere you are on the Web, listening is important to your digital presence. You are building a brand through images and text, and your head is on the "guillotine" everyday if you just rest and don't stay totally tuned in a systemic approach. Business, corporation-related and societal events, and basically everything are simply interconnected and need simultaneous dedicated listening.

There is too much information being processed online for you to listen manually. I would advise you to explore the automated tools that exist. There are many free tools as well as tools for purchase that can help you gather all the data being said on your product, brand, and team.

A tip here is to determine your keywords that are relative to your business. Keywords are those words that are associated with your listening focus. It would be your company, product, or brand. It might include your category, like *ketchup,* as opposed to listening for just *Heinz.* These are words that are key to your success in the marketplace. For example, if you are in the wireless telecommunications industry, those keywords are *dropped calls, 3g, mobile apps, smartphone, data plan,* and so forth. Keywords should reflect what is important to your business. One tool to assist you in the determination of those keywords is Google Keyword Tool. If you type in a term, it shows you the other terms that people are using when they are also searching for your term. For instance, if I type in *Sandra Carter,* it suggests "Sandy Carter." If I type in *SOA,* the Google Keyword Tool shows "flexible architecture."

Another free tool I use is called TweetDeck. I use it to select keywords on brand or category and see all the mentions of that word in any Tweet. It is still a somewhat manual process, but it does provide you a way to listen and respond. You can also use HootSuite, and I know that Twitter itself is trying to make its environment friendlier for searching and listening to these keywords. If you are looking for more sophisticated ways to listen, tools such as IBM's Cognos® Consumer Insight enable you to listen and see sentiment through an automated collection of Social Business and powerful analytics.

Some of the tools in this growing space include these:

- **IBM Cognos Consumer Insight:** A tool to analyze consumer sentiment on publicly available social media sites—blogs, forums, and discussion groups. You can find more information about this tool at www-01.ibm.com/software/analytics/cognos/analytic-applications/consumer-insight/.

- **Social Mention:** Provides free daily email alerts of your brand, company, CEO, or marketing campaign, or on a developing news story, a competitor, or the latest on a celebrity. You can find more information about this tool at www.socialmention.com/.
- **TweetEffect:** Helps you find out which of your Twitter updates made people follow or leave you. You can find more information about this tool at www.tweeteffect.com.
- **Converseon:** A social media listening agency that listens "for you." This listening is one of the many types that we at IBM leverage. You can find more information about Converseon at www.converseon.com.
- **Spiral16:** Software tool set that provides a fresh approach to social media monitoring based on organization, accuracy, visualization, and analysis. You can find more information about this tool at www.spiral16.com.
- **Google Alerts:** Provides batch or streaming updates of the latest relevant Google results (Web, news, etc.) based on your choice of keywords or topics. You can find more information about this tool at www.google.com/alerts.
- **Insights:** A search tool for Facebook walls to help you identify the traffic around a set of keywords and phrases. You can find more information about this tool at https://developers.facebook.com/docs/insights.
- **TweetDeck:** A free tool that enables you to monitor keywords on your category or brand. You can find more information about this tool at www.tweetdeck.com.
- **HootSuite:** A free tool that enables you to monitor keywords on your category or brand. You can find more information about this tool at http://hootsuite.com/.
- **Samepoint:** A tracker of conversations throughout social media sites. User-generated discussions are typically not indexed by major search engines, such as Google, because they do not reside on static pages. Samepoint.com converts these discussions into web pages, or permalinks, and organizes them within a tag cloud. You can find more information about this tool at www.samepoint.com/.
- **Follower Wonk:** A Twitter application that creates Venn diagrams showing the overlap among followers of up to three different Twitter accounts. You can find more information about this tool at http://followerwonk.com.
- **Alexa.com/siteinfo:** A site that enables you to measure the ranking of your website with the Alexa scoring. You can find more information about this tool at www.alexa.com/siteinfo.

What you want to listen for are items that you have deemed helpful for you to improve your brand or product, as well as negative comments that might be untrue or biased. If you can determine the topics that are important to your business and identify them as potential keywords, those are the words you should search for. Over time, refinement of your listening will enable you to search for new keywords, noting keyword trends.

Some of the things you want to listen for include comments to improve your product, your company, or new trends on the horizon. The way you share the information that you learn from listening will also be a key to your success. Listening is about professional development. Everyone inside of your company should be familiar with what is going on in the marketplace daily. Knowing what is going on makes employees better at their jobs.

Some things that could cause a red alert include employee misuse of the tools, or issues that need to be handled right away, such as quality or safety issues. Of course, complaints and concerns should be explored. Some might require a response and some might not.

Things that I look for include the following:

- **Brandjacking:** Brand hijacking happens when consumers appropriate the brand for themselves and add meaning to it. For instance, one of our Senior Leaders at IBM found that someone was impersonating him on Twitter.
- **Employee or contractor/supplier/agency misuse:** For instance, Chrysler fired their social media agency after they used a Twitter f-bomb.
- **Quality and safety issues:** Think about United's quality issue in handling baggage.
- **Activist protest wave:** Nestlé saw a negative Twitter tsunami when a Forest Activist, one week before the U.S. Easter holiday, put up videos about the supposed destruction of forests by Nestlé. There were more than 1.2 million negative YouTube videos, and 95,000 Facebook fans who saw the negative messages.
- **Trade secrets being shared:** Sharing confidential information is a big issue and is why one of IBM's Social Business guidelines is to not share this type of information.
- **Criminal activity:** Anything that is illegal needs to be immediately addressed.
- **Foul and abusive language:** The previous example of Chrysler illustrates this point.
- **Threats against individuals:** At no time should an individual be targeted. In the David Carroll video about United, he later apologized for calling out one employee by name.

The important element in this first step is to ensure that you know what is happening around your company and brand. To build your reputation, improve it, or avert a crisis, you must understand what is being said, who is saying it, where it is being said, and how impactive it could be. If your PR team or newspaper is telling you about it, it is probably too late. The following list shows the keys to planning for proactive listening:

1. Create search words applicable to your Social Business.
2. Select one or more tools for listening.
3. Train on what to listen for.

Chapter 7, "Analyze Your Data," covers more in-depth ways to listen.

2. Create Your Brand Army

Maggie Fox, CEO and founder of Social Media Group, coined the term "brand army." A brand army is a group of unpaid and paid advocates (that is, your employees!) who engage on behalf of your brand. Your brand army consists of your employees, management, and C suite, and your "friends." Remember that the C suite does not have to be the CEO, but could be a leader in a division or someone influential.

This brand army for your company needs to stay at the forefront of all your brand's news, connections, and actions. In essence, they shape your brand online. They need to embrace transparency while they engage and exchange information with your clients, friends, and fans. They need to be "in the know" and be responsive. Patrick Vogt, writer for Forbes.com, made a great comment on the value they can bring if viewed from a long-term perspective:

> "Topics that do surface have tremendous value for a learning organization, and must be cataloged and reviewed by senior management on a regular basis."

Take the team seriously. You wouldn't put interns in charge of investor relations, so don't put them in charge of your online response! Also, always ensure that legal is part of your brand army. Legal needs to be a full partner in the team.

Your team needs to be in the know—they need to have the information in order to be effective. At IBM, I have my top brand advocates on my brand army, and I communicate to them via private email or more often through phone calls because of the urgency sometimes on the subject so that they have the latest information and can help me shape it. My brand advocates are typically tippers in the area on which I am focused. The number is not important, but what is important is that this is a group of people who love your company, brand, or product and are willing to take a stand because of that passion. This communication needs to occur on a regular basis and especially in times of crisis. Although it seems simple, many companies forget to share this valued information while in the midst of a potential challenge.

This team needs a content activation strategy both for overall reputation management and during a crisis. A content activation strategy is a plan for how content is created, distributed, promoted, and measured. For instance, when your company has a new product announcement, who creates the package of information to share with your top bloggers? In fact, this concept is becoming so important that there is a new role being created, the Chief Content Officer. (Note: LinkedIn has a group just for this new role, at http://www.linkedin.com/groups?home=&gid=2921919&trk=anet_ug_hm !.)

In a noncrisis, making sure that the right content is in the right hands is very important. Things like the following would be important to share:

Quick Cheat Sheet:

Twitter Handle (ID) is: @xxx

Official Twitter Hashtag: #xxx

Shortened URL for the Best Site for Information: xxx

Hot Topics This Week:

Additional recommendations to drive the dialogue: deep content

Learn more and spread the word! Educational topics

Most FAQs:

Question 1:

Question 2:

Suggestions on Communities to Join:

Subscribe to xxx

In the midst of a crisis, sometimes the people who should be creating and distributing content are consumed in putting out the fire. This is too important to miss. A Social Business will often establish a shared services model with a Social Business Reputation and Risk Manager. The role of this individual is to own the responsibility for listening and then filtering information to the correct departments inside the organization. For example, the Social Business Reputation and Risk Manager might pick up a negative sentiment around supporting a product. It is not his or her responsibility to respond, but instead his or her responsibility to notify the appropriate brand army (customer support and advocacy) to handle that situation. The task of making sure you have built the relationships and trust with your brand army includes arming them with strong content.

Finally, I discussed the importance of employee training in Chapter 2, “Align Organizational Goals and Culture.” This element is essential in the midst of a crisis. Your first steps should be a Social Business Guideline document and training. Take, for instance, supermarket chain Price Chopper. When a client complained in a tweet about the supermarket, the supermarket's public relations team went to the tweeter's employer and asked for disciplinary action to be taken. (How did they find out his employer? They went to the client's Twitter id and determined his employer from his profile.) It turns out that the customer's friend is a top blogger, and he blogged about the incident, with lots of comments on the situation, and how it was handled (http://pricechopperfail.tumblr.com/post/1156969465/price-chopper-attacks-customers-job-over-negative-tweet). Needless to say, all employees should be trained on how to respond to negative comments.

The following list articulates the key items for your planning with your brand army:

1. Determine your brand army, including brand advocates, legal, executives, subject matter experts, and others critical to your success.
2. Define the roles of Digital Council, Social Business Reputation and Risk Manager, Executive Team, and Brand Advocates.
3. Plan for your "alert system," whether red/yellow/green or number-based.
4. Refine your content activation strategy before, during, and after a crisis.
5. Train everyone.

3. Create a Response Plan

The response plan should be created ahead of any challenge or crisis. It consists of a few items. Think through the following:

- Who flags an issue? To whom does the issue get flagged? PR? Analyst Relations? Legal?
- When should action be taken and who takes the action? Sometimes, communications isn't the way to solve. A rating system helps here. The worse the situation, the higher the response should come!
- Which tool(s) should be used to respond?
- What should the content and overall tone be in the response?
- How do you treat comments? In my opinion, you should treat all social comments as if you were talking to clients, stakeholders, investors, and competitors, because you are!

Who?

The first thing your response plan needs to focus on is clear roles on who will flag when a response is required. Usually the Social Business Reputation and Risk Manager will be the one responsible for this action based on an analytics system (see Chapter 7). This person should be trained and empowered to do this important work. Also, make sure your brand army understands the plan and protocol. Basically, the job description for the Social Business Reputation and Risk Manager is to listen, determine the response and who should respond, contribute to the content activation strategy, and arm the brand army with the facts.

When?

Next, develop a rating system for items that need to be addressed and those will be communicated in an official capacity to the overall team—including your Digital Council. This again should be led by your Social Business Reputation and Risk Manager. That manager should know the Terms of Service for each social tool. For example, YouTube, Twitter, and Facebook all have their own guidelines on unacceptable conduct. I personally contacted YouTube, for instance, when someone commented on a video that violated YouTube's guidelines for posted comments. They took care of the situation right away for me.

I recommend establishing an internal set of terms of service, perhaps in a red or yellow rating on items that you monitor. A great best practice is having a dashboard on these for C suite and for the Social Business Reputation and Risk Manager.

A red rating is one that is a concern to your company—and this does vary by company. Typically, a top executive would address a red-rated item, and given that response time is paramount, plan ahead for which executives are the key communicators. A red-rated item might be a security breach or a tragic product-quality issue. But also know when to take a conversation offline. Sometimes it is best to do a face-to-face or phone call.

A yellow-rated item is a cautionary item of interest. Some of these might be answered and addressed by your community. Again, each company has its own tolerance level. An example of a yellow-rated item would be several comments on a product feature someone doesn't like, or a customer service issue.

Of course, there will be comments in the blogosphere that you will not respond to. Examples would include a client comparing your brand (maybe unfavorably) to another brand, or a minor negative comment on your product. Think through the criteria for those as well.

Make sure you allow for a dialogue. You will need an FAQ wiki so that the details and questions plus your responses are given to the brand army. Don't worry if you don't know the answers to all the questions. As the information becomes available, you will be able to fill in the blanks. But do not publish an external FAQ without the ability to comment and allow for discussion. Use your blog, your Facebook fan page, or your community site to invite discussion.

Which Tools?

Your choice of response tool will be important, too. In some cases, I have seen an issue in Twitter and the company responds on their website. This does not work. As the saying goes, "fight [social] fire with [social] fire," meaning that if the comment was made on Twitter, refute the comment on Twitter. It is critical that you address the issue where the crisis broke out. So if the comment was made on YouTube, address it on YouTube; if it was made on Twitter, then go for Twitter.

What?

Of course the content that you respond with makes a difference. Do your research and make sure you release data in real time even though you might not have all the information complete. If you made a mistake, then apologize. In every relationship an apology opens the door to conversation. Make sure you discuss why the issue happened and what you are doing about it. For example, did you appoint the wrong type of person for handling a complaint, or did you not have the right guidelines in place? Ask your community for their thoughts if appropriate.

How?

Your action should be quick, personal, and direct. Using the internal terms of service will help you decide how. With red ratings that require action from a senior executive, often the appropriate channel for a response is not from any one person, but from the company through an a blog, an online release, or an announcement on your company's website, Facebook page, or Twitter channel. The yellow-rated items probably do not need to go through the same level of review as the red items, and thus a response could be directly from an individual.

At the end, use this opportunity to reflect on what happened. How does this impact the longer term? Collect those issues that are indicative of a larger trend. The list that follows outlines the key items for your response planning:

1. Speed: Get your Digital Council together.
2. Classify into type of issue.
3. Clarify who responds to which issues.
4. Communicate to your "brand army."
5. Activate the plan by updating blogs, tweets, etc.
6. Create a feedback loop for learning.

Learn from Great Examples

As I discussed upfront, there are a lot of examples to learn from, to learn how companies managed through their crises and how some avoided them. The following case studies demonstrate the best of what to do and what not to do! However, please note that the biggest idea to take away is that nothing in this chapter can make up for bad customer service, or a bad product, or—the list goes on. People use the social tools to vent, but having the right product or right customer service processes in place is the real area to address if your company experiences a social disaster. As discussed in Chapter 5, make sure your company is looking at your organization as a whole, and that your culture is willing to be open and transparent. Having the right culture, product, and process is the best way to avoid a disaster!

Richard Branson, CEO and founder of Virgin Atlantic, said in a London keynote,

> "Get the product right, put a great brand on it, and then you'll have a great success."

Today, in the blogosphere, they listen and respond to every client comment, whether it is about delayed flights, service treatment, or ideas on their great Twitter offers. They have mastered the art of teaming and engagement both online and offline. But this was not always the case. In 2008, employees on social networks wrote about safety issues. Virgin did the same thing most companies did at that time—found the employees, reprimanded them, and pulled down the comments. Today, they fix those issues that are real, and ensure that the public knows about the actions that they've taken.

CASE STUDY: DOMINO'S PIZZA DEMONSTRATES BOTH "WHAT NOT TO DO" AND HOW TO EXCEL

It all started in North Carolina at a local Domino's pizza location. Employees decided to post YouTube videos of themselves engaging in the unsanitary acts of putting cheese up their noses and sneezing on sandwiches. Millions of people watched the video until it was blocked.

The response from Domino's was slow and done poorly. Forty-eight hours after the video was posted, their president was shown on YouTube with a heavily scripted response. Not quick, personal, or direct. The results showcased this poor response plan. Financially, the stock price dropped 10% the week the video was released. A follow-up study by HCD Research found that 65% of clients (meaning they had previously ordered from Domino's) were now less likely to visit Domino's again. This social incident caused damage to Domino's 50-year-old reputation.

The failures? They didn't see the video until too late, and that caused them to respond too slowly. In addition, they didn't respond transparently. In the end, Domino's reflected on what happened and made changes as they applied social learning. They are an outstanding social company today because they learned (as many of us did) from this incident.

Why do I say outstanding? Today, they have a listening strategy and monitoring plan across Twitter and Facebook. Based on what people are saying, they respond consistently. For instance, during football season, someone complained about the time it took to get a Domino's pizza delivered, so a local Chicago franchisee gave the client a free ticket to the next Chicago football game. Another person had an issue with one of the pizzas they had ordered, so the general manager of the franchise went down to the store and did a video apology. The video went viral around the world and Domino's had a client for life!

And they have innovative ways to get their clients to become brand advocates. For instance, on the menu that is on the pizza box, they locally print their favorite top-10 tweets from local clients each month. Their clients like to see their tweets come into their homes and those of their neighbors! They are innovative in their use of social tools as well. They are leveraging Foursquare, a location-based service covered in Chapter 4, "Engage Through Experiences," and really treat their "mayors" with care. Overall, their plan is a phenomenal combination of global advice and best practices executed in a local fashion. Ramon DeLeon, the managing partner of six Domino's franchises in Chicago, framed it for me:

> "Our social strategy is measured on three things: revenue, profit, and fun. And it delivers!"

But their next challenge is upon them! In the second quarter of 2011, they kicked off a campaign with a Twitter hashtag #DPZChicken, asking their clients to comment on their new chicken product. About half of the tweets so far are negative—for instance, "never again…not impressed!" and "still taste the same to me, horrible." Domino's has already responded, thanking the clients for their feedback and articulating how they are going to fix the chicken, but the verdict is out on the change. To their credit, they wanted open and transparent feedback, and responded in the right way when they received it, and they did so quickly. Let's follow their continuing story!

CASE STUDY: FORD MOTOR COMPANY DEMONSTRATES SPEED

Scott Monty, a Ford Motor Company Social Business manager, is a great example of averting a social disaster by listening, and being alert and ready. He consistently listens to Ford activity on Twitter, blogs, and forums, as well as other social tools. When Ford attorneys sent letters of "cease and desist" to users who had altered the Ford logo, he acted quickly and in a personal and direct manner. Everyone could read his tweets, knowing he was on their side: "I'm in active discussions with our legal dept. about resolving it. Pls retweet #ford."

Scott eventually got this issue resolved. It was not an easy task, given that those angry with Ford were also part of his "brand advocates" group. But the quick and direct action diverted a disaster.

What did Ford do right? It had the right listener to know what others thought about this new move, namely Scott. Within 24 hours, Scott countered the comments and built trust and positive responses through the actions that he took. And Ford was flexible in its busines process. It changed!

CASE STUDY: AMAZON.COM FALTERS BY NOT LISTENING

On Amazon.com, an attack group removed all books from Amazon.com written by gay, lesbian, bisexual, and transgender authors. Many people, especially activists, were angry and upset and of course expressed it loudly on Twitter, on Facebook, and in numerous forums. Amazon.com moved slowly to respond because they didn't listen proactively. Therefore, the community assumed that they had removed the content on purpose. This social war continued longer than it should have due to their lack of listening.

CASE STUDY: KENNETH COLE PROVOKES A PUBLIC UPRISING

Designer Kenneth Cole attempted to take advantage of the Egyptian uprising in 2011 to sell his spring collection of clothing. His tweet:

> "Millions are in uproar in #Cairo. Rumor is they heard our spring collection is now available online at http://bit.ly/KCairo - KC."

Within one hour, there were more than 1,500 negative tweets.

Kenneth Cole did delete his first tweet and posted on his Facebook page the following:

> "I apologize to everyone who was offended by my insensitive tweet about the situation in Egypt. I've dedicated my life to raising awareness about serious social issues, and in hindsight my attempt at humor regarding a nation liberating themselves against oppression was poorly timed and absolutely inappropriate."

What went wrong here? This company was trying to use the situation for their own good, not for the good of the brand advocates and clients. This strategy does not work well in the blogosphere. In addition, Kenneth took too long to retract and apologize. Forty-eight hours is just too long. Also, all employees should go to training—including top executives!

Conclusion

The Social Business AGENDA means planning for the worst and expecting the best. Social reputation management is a relatively new concept focusing on people's actions online and converting those negatives into positive articles, blogs, or news stories. Your reputation can sway public opinion positively or negatively, which ultimately will have an impact on the success of any business in which you are involved. Risk management is about planning for those negative moments and being ready to execute. When a crisis brews, the social world dictates the amount of time you have for reaction. It is the worst time to try to develop a plan from scratch. A strong focus from your Digital Council will enable you to have an integrated strategy to get through the crisis, and ideally avoid it. Common patterns and learning from any crisis are valuable for a Social Business and should be reviewed by the C suite on a regular basis.

An action sheet for reputation and risk management is available as a bonus at www.ibmpressbooks.com/title/9780132618311. Create an account and register your book to gain access. (After you register your book, a link to the additional content will be listed on your Account page, under Registered Products.)

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