



# Social Media Strategy Workbook

HOW TO BUILD A STRATEGY AND  
EVALUATE CURRENT PROGRAMS

# Does Your Social Media Strategy Need a Reboot?

With weekly changes in the social media landscape, new channel features to assess, and evolving needs of the business, pharma marketing professionals are constantly evaluating and testing new social strategies, tactics and capabilities.

This social strategy workbook will guide you through structured question sets to think through as you organize and outline a plan of action.

## DETERMINE WHICH SCENARIO IS THE BEST FIT.

1. You inherited, or need to evaluate, an existing community or social media program
2. You have had a change in the business that may impact a social media initiative
3. There has been a change in target audience or social media property
4. Your business requires a new program or initiative with a new social media strategy

# Evaluate an Existing Community or Social Media Program

If you have inherited a social media community or program or need to re-evaluate one, these are good questions to ask to assess performance and ensure the program is aligned with current business objectives.

Does the online community or program have a strategy?

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Does it have measures? Do they align to the current business objectives and measures? Are they reported regularly?

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Are goals set? Are they meeting these goals / objectives - what is the overall health / wellness of the community?

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Does it have executive visibility? An executive champion?

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Does it match with the current corporate / product branding, tone, voice?

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Is there value in the existing audience? Are you retaining / growing the audience?

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Does the audience take the actions intended (comment / share or click / consume) Are there motivators [intrinsic / extrinsic] to participate?

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What are the resources / time needed to maintain the community or program? Is it internal resources? Outsourced? Or combo?

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# Example

## QUATERLY METRICS SCORECARD TIED TO BUSINESS OBJECTIVES

### SCORECARD - FACEBOOK EXAMPLE

| GOAL & MEASURE                | Q3 | Q4 | QoQ CHANGE   | COMMENTS |
|-------------------------------|----|----|--|----------|
| <b>DRIVE AWARENESS</b>        |    |    |  |          |
| Total Contacts Acquired       | #  | #  | 12%   |          |
| Facebook Fans                 | #  | #  |  |          |
| CRM Contacts                  | #  | #  |  |          |
| <b>Content Success</b>        |    |    |  |          |
| Impressions (Reach)           | #  | #  | 5%  |          |
| Engagement                    | #  | #  | 12%  |          |
| <b>Purchase Behaviors</b>     |    |    |  |          |
| Loyalty Program Participation | #  | #  | %  |          |
| Compliance Monitoring         | #  | #  | %  |          |

### ACTIVATE HCPS

|                             |   |   |   |  |
|-----------------------------|---|---|---|--|
| <b>Content Success</b>      |   |   |   |  |
| Consumption                 | # | # | % |  |
| Shares                      | # | # | % |  |
| <b>Insights Identified</b>  |   |   |   |  |
| Number of Insights Shared   | # | # | % |  |
| Number of Insights Actioned | # | # | % |  |

# Evaluate a Business Change

It's all too easy to get focused on execution and not take time to pull up and review your strategy. We recommend quarterly strategy reviews to evaluate ad programs, content and KPI success, and look for opportunities. You should review your overall strategy at least once per year.

Did the business objective change? \_\_\_\_\_

Did the social media objective change? \_\_\_\_\_

Did the product positioning change?  
Go global? \_\_\_\_\_

Did the product branding or ownership  
change? \_\_\_\_\_

Did the competitive environment change? \_\_\_\_\_

Generics launched? More/less  
competitors? Change in their strategy? \_\_\_\_\_

Did the executive sponsor change or  
leave? \_\_\_\_\_

Was there a crisis, FDA letter, activist  
focus on the brand / product / social  
property? \_\_\_\_\_

Did the budget / staffing / resources  
change? \_\_\_\_\_

Is this a new product or did a new market  
open? \_\_\_\_\_

# Evaluate a Target Audience or Social Media Property Change

Change is the constant when it comes to social media. New capabilities and features are being released weekly, and usage behaviors are rapidly evolving as well. Think through these questions to ensure you're still tracking with your audience.

Did the target audience change, expand or contract?

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Is there still value in the target audience?

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Was the product approved for a new indication or audience?

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Did the target audience needs or behaviors change?

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Did the audience or participation move to a new social media property?

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Did a new technology emerge?

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Did the platform features, advertising options or the value of the advertising change?

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Map the Patient Journey across social touchpoints to document motivators, barriers, behaviors, insights and key opportunities.

| <b>PATIENT JOURNEY</b> →  | CONDITION EMERGES   | SEEK DIAGNOSIS | DIAGNOSIS & TREATMENT | TREATMENT CHANGE OR FAILURE | TREATMENT ABANDONMENT | RESOLUTION (FOR NON-CHRONIC CONDITIONS) |
|---|---|----------------|-----------------------|-----------------------------|-----------------------|---|
| <b>WHAT IS PATIENT GOING THROUGH? HOW DO THEY FEEL? WHERE AND WHAT ARE THEY SAYING?</b> |   |                |                       |                             |                       |   |
| <b>PATIENT PARTICIPATION MATRIX</b>   |  Groups Channel       |                |                       |                             | ✓                     |   |
|   |  Social Networks     |                | ✓                     |                             |                       |   |
|   |  FB Condition Groups | ✓              |                       |                             |                       |   |
|   |  Owned Communities   |                |                       |                             | ✓                     |   |
|   |  New Community       |                |                       |                             |                       |   |
| <b>OPPORTUNITIES TO ADD PATIENT AID / VALUE</b>   |   |                |                       |                             |                       |   |
| <b>DESIRED BEHAVIORS</b>  |   |                |                       |                             |                       |   |
| <b>MOTIVATORS &amp; BARRIERS</b>  |   |                |                       |                             |                       |   |

# Create a New Social Media Strategy



“Wait - you mean social media marketing costs money?”



# Situation Analysis

Describe the current state of your social media presence including supporting resources, technology, and processes.

## 1. COMPLIANCE

- Do you manage adverse events on all owned channels including mobile and messaging apps? \_\_\_\_\_
- Do you have a solution to properly identify, report, track and manage AEs on social media? \_\_\_\_\_
- Do you have the ability to scale AE management for 24/7 detection with tagging and routing? \_\_\_\_\_
- How does this compare to your competitors social footprint, post and response frequency? \_\_\_\_\_

## 2. GOVERNANCE

- Do you have employee social media guidelines, roles & responsibilities for the social media team? \_\_\_\_\_
- How could the process of approving new social media campaigns and content be more efficient? \_\_\_\_\_
- Is there a process to audit regional efforts with proper business controls? \_\_\_\_\_
- Is there a documented social brand identity for the company and / or each product brand? \_\_\_\_\_

### 3. COMPETITION

- Who are your closest competitors? \_\_\_\_\_
- How large is their following? \_\_\_\_\_
- How often do they post? \_\_\_\_\_
- What type of content do they publish? \_\_\_\_\_
- What's the level of engagement? \_\_\_\_\_

### 4. TALENT

- Do you have the right skills required to participate in social media? \_\_\_\_\_
- Do you have the right mix of in-house and agency partner resources? \_\_\_\_\_

### 5. TOOLS

- Do you have the right software to facilitate monitoring, engagement and conversations ensuring patient experience and scale? \_\_\_\_\_

### 6. TONE

- Are brand mentions positive or negative, and what are the implications regarding reaction time and nature of response? \_\_\_\_\_






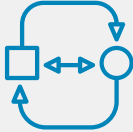
### 7. TESTING

- Do you have a process for evaluating and testing new channels, capabilities? \_\_\_\_\_
- Have you been able to grow your engagement in core channels? \_\_\_\_\_

An effective social strategy is supported, not defined, by technology.

FDA compliance is always top of mind when planning social media programs. Ensure your process includes a hybrid of technology and human agents to guarantee complete coverage.

## BEST COMBINATION FOR COMPLIANCE

|                           |   |  |   |
|---------------------------|---|--|---|
| <b>HUMAN TOUCH</b>        |  <p><b>Content is reviewed by agent:</b><br/> <b>AE?</b><br/> <b>Reply?</b><br/> <b>Approve?</b></p> |  <p><b>Tag content and authors for issues and insights</b></p>                                    |  <p><b>Escalate as needed</b></p>  |
| <b>TECHNOLOGY ENABLED</b> |  <p><b>Simplifies review process</b></p>   |  <p><b>To ensure compliance, archive source content, participants, timelines and actions.</b></p> |  <p><b>Reduce transmission error with software generated AE submission</b></p> |

# Goals, Objectives & Metrics

1. Start with your business objectives, and then ensure your social media goals support one or more of these objectives. Which objectives will this plan impact?

|  |   |
|--|---|
| <p><b>WEBSITE</b></p> <ul style="list-style-type: none"> <li>• Grow traffic</li> <li>• SEO</li> <li>• Content creation - marketing</li> <li>• Product recommendations</li> </ul>   | <p><b>R&amp;D</b></p> <ul style="list-style-type: none"> <li>• Idea generation</li> <li>• Prioritization</li> <li>• Beta testing / Focus groups</li> <li>• Strategic partnering</li> <li>• Content creation - software</li> </ul> |
| <p><b>BRAND</b></p> <ul style="list-style-type: none"> <li>• Crisis management</li> <li>• Case studies</li> <li>• Direct communications with customers</li> <li>• Find brand advocates</li> <li>• Personalize the company</li> <li>• Corporate or exec branding</li> </ul> | <p><b>SALES</b></p> <ul style="list-style-type: none"> <li>• Product recommendations</li> <li>• Use cases</li> <li>• Impulse buy</li> <li>• Question &amp; answer- pre-sales</li> <li>• Word of mouth marketing</li> </ul>        |
| <p><b>SUPPORT</b></p> <ul style="list-style-type: none"> <li>• Content creation - support</li> <li>• Content creation - learning</li> <li>• Questions and answers</li> </ul>   | <p><b>INTERNAL COMMUNITY</b></p> <ul style="list-style-type: none"> <li>• Communication</li> <li>• Knowledge sharing</li> <li>• R&amp;D</li> <li>• New employee education</li> </ul>  |

The single biggest point of failure in social media programs is not having them tie directly to the business goals.





## GREAT PROGRAMS DELIVER BUSINESS OBJECTIVES

| BUSINESS OBJECTIVES  | ALIGNED SM OBJECTIVES  | MEASUREMENTS  |
|--|--|---|
| <b>BRAND AWARENESS</b><br>Increase potential customer awareness of brand / product | Use SM to contextually insert the brand/product name(s) in front of the strongest group of potential customers   | <ul style="list-style-type: none"> <li>• Measure reach, impressions, engagement on branded content</li> <li>• Measure sales lift or traffic to ecommerce pages</li> </ul>             |
| <b>GROW MARKET</b><br>Create advocates and educate consumers                       | <ul style="list-style-type: none"> <li>• Education &amp; value proposition to potential customers</li> <li>• Share positive reviews</li> <li>• Coupons for first purchase</li> </ul> | <ul style="list-style-type: none"> <li>• Reach/impressions and engagement on educational content</li> <li>• Number &amp; sentiment of reviews</li> <li>• Coupon redemption</li> </ul> |
| <b>EXPAND USAGE</b><br>Increase repeated use and purchase of product               | <ul style="list-style-type: none"> <li>• Consistent product reminders to incent repurchase</li> <li>• Coupons and incentives for repurchase</li> </ul>                               | <ul style="list-style-type: none"> <li>• Repurchase sales metrics</li> <li>• Coupon redemption</li> </ul>   |
| Start with existing business objectives  | Develop supporting social media objectives   | Define success metrics  |

2. Have you created separate scorecards for stakeholders, partner functions and social tactics with meaningful metrics for each?

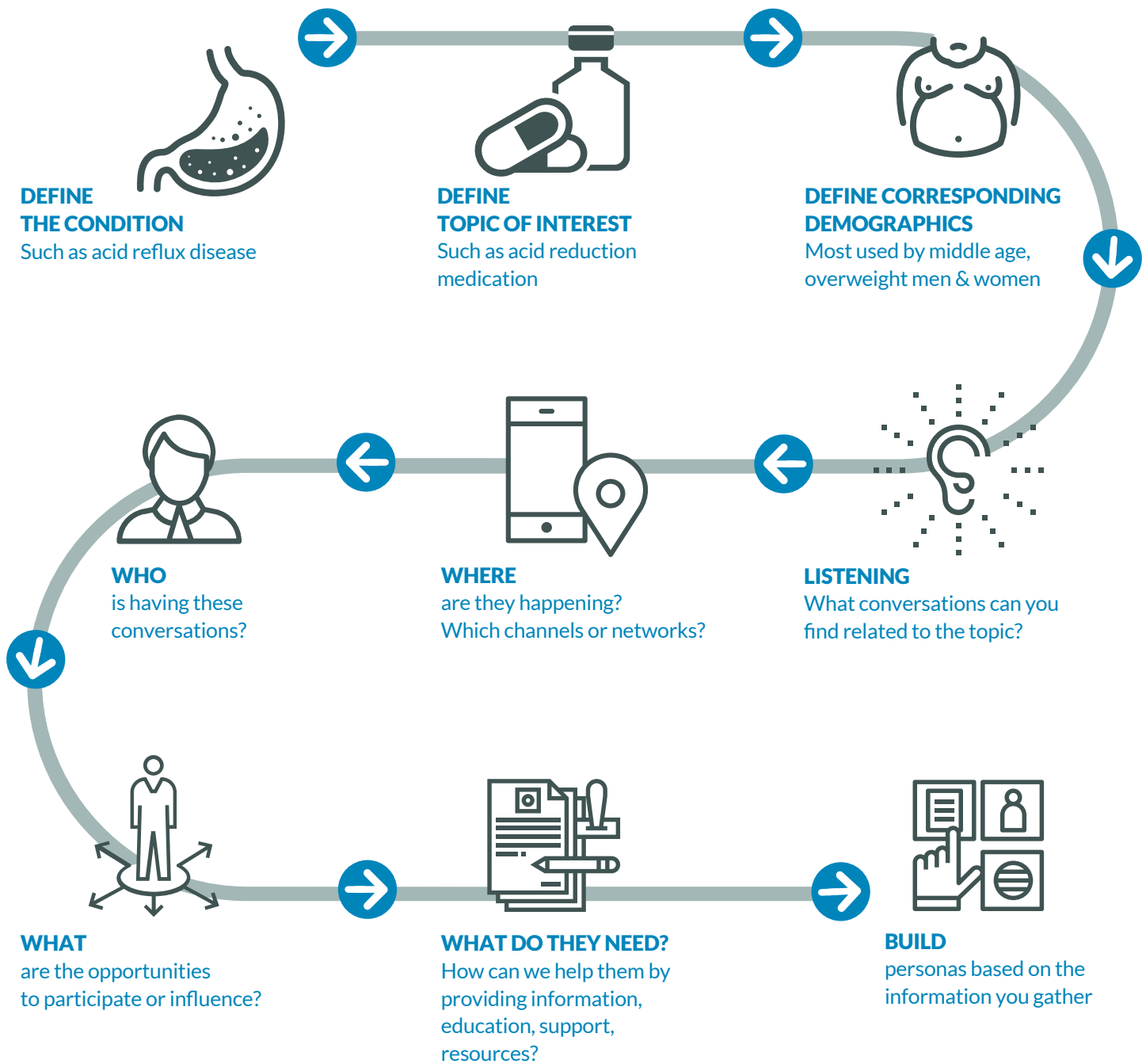
3. Are you trying to define value to your stakeholders in terms they don't speak? Ex: don't say "clicks", say "leads" to the marketing manager. Don't say "questions answered" to the customer service team, say "contacts avoided".

### BUILD A MORE EFFECTIVE SCORECARD

| Channel      | Objective                 | Metric                  | Annual Goal | Monthly Goal | Monthly Actual | Tracking  |
|--------------|---------------------------|-------------------------|-------------|--------------|----------------|---|
| Social Media | Positive brand perception | Sentiment               | 90%         | 80%          | 83%            |  |
|              | Patient Engagement        | Comments, shares, likes | 35%         | 25%          | 29%            |  |
|              | Conversion                | Coupon redemption       | 22%         | 22%          | 15%            |  |
|              | Acquisition               | New database entries    | 24,000      | 2,000        | 1,947          |  |

# Target Audience

A successful content strategy starts with defining your target audience, choosing the right channels, and constructing creative that will resonate.



# Strategy & Tactics

There are three key types of social media strategies used by pharma brands: Corporate, Condition, and Product strategies. Here are example of each:

| KEY STRATEGY     | EXAMPLES   |
|------------------|--|
| <b>CORPORATE</b> | <ul style="list-style-type: none"> <li>• All products are in a single space or target audience</li> <li>• Reputational focus such as community giving or thought leadership</li> <li>• Rebrand of acquired product that was tied to another company</li> </ul> |
| <b>CONDITION</b> | <ul style="list-style-type: none"> <li>• Raise visibility of a disease journey by an industry leader</li> <li>• Advance your patient journey or shorten diagnosis time</li> <li>• Social support around the disease</li> </ul>                                 |
| <b>PRODUCT</b>   | <ul style="list-style-type: none"> <li>• New product launch</li> <li>• Well known umbrella brand with lesser known products</li> <li>• Highly competitive space or high brand recognition of competitor</li> </ul>   |

## 1. What is your primary social marketing strategy?

- Corporate focused
- Condition focused
- Product focused

## 2. Broadcast vs. Destination: What is the better approach for your strategy?

- Broadcast: Targeted reach in existing communities - go where they already are and become relevant (push).
- Create a new community as a destination to share experiences and gather information (pull).

# Considerations

## 3. Channel considerations

- Channel strengths and weaknesses
- Limitations of content type, ownership, etc.
- Legal concerns and limitations
- Target audience penetration and access methods
- Cultural brand fit
- Brand resources
- Paid advertising budget
- Social risk level based on content/topic



**Social spaces don't launch themselves; any new social effort needs advertising and marketing to get off the ground.**

## 4. Content

- When broadcasting content, ensure the copy, creative, tone and calls-to-action fit the channel



# Example campaign creative

## Engage to Make Changes & Win



### TEST YOUR SMARTS



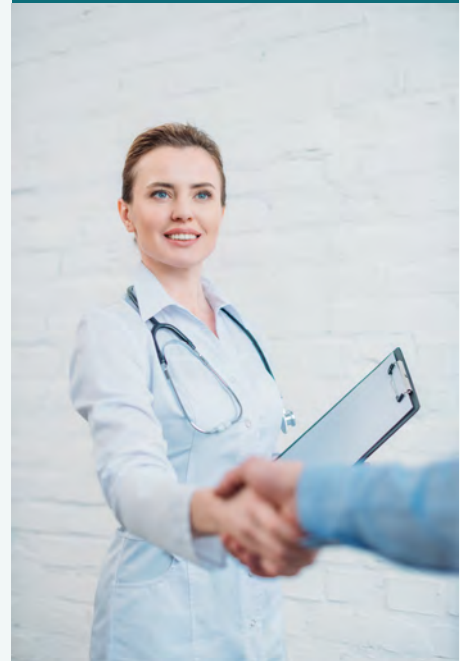
Test how well you understand your health insurance benefits for a chance to win.

### SEE & SOUND OFF



Watch the "Using My Benefits" video and share your opinion for a chance to win.

### CONCENTRATION



Match the health insurance terms and definitions for a chance to win.

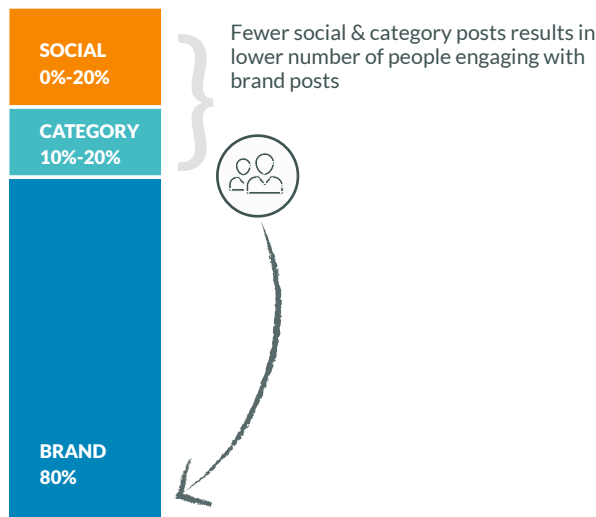
# Considerations for Destination Communities

The right content mix will improve participation and engagement rates that result in increased overall program value.

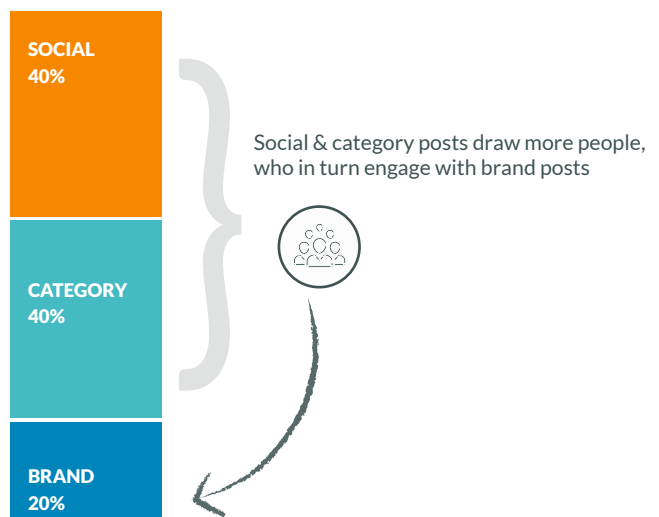
## TYPES OF CONTENT

| TYPE                               | DESCRIPTION  | OBJECTIVE  |
|------------------------------------|--|--|
| <b>SOCIAL CONTENT</b><br>40%-60%   | Content that is about the customers, not the brand, designed to elicit participation from and among the participants | Engage the audience in further discussion and create a clear reason to continue to participate.                  |
| <b>BRAND CONTENT</b><br>10%-30%    | Content that refers to the product or brand specifically.  | Drive participants to take specific value added actions that drive the ROI of the overall program.               |
| <b>CATEGORY CONTENT</b><br>30%-50% | Content around the same topical area that forms the key value proposition of the program.                            | Content that demonstrates expertise in subject matter and extends topics beyond the brand or business objective. |

### TYPICAL BRAND RATIO



### RECOMMENDED BRAND RATIO



Nobody likes the guy at the party who only talks about himself. Make sure to balance content topics to keep people engaged.

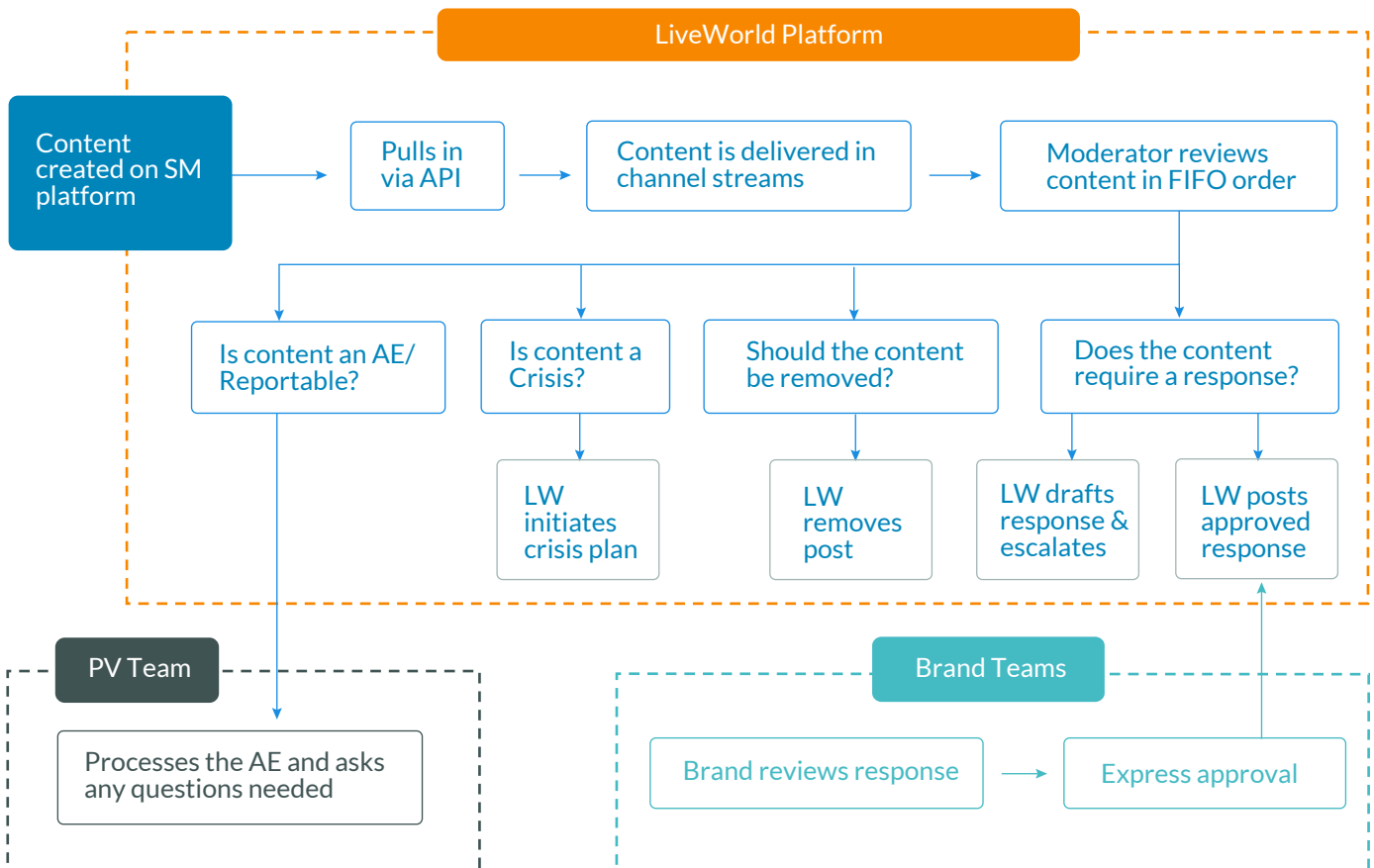
The brand's job in social isn't to create and push the stories. It's to provide the framework and rewards that inspire customers to share their own stories.

5. Have you considered using stories (patient, provider, caregiver) to humanize your product or brand message?

6. Are you planning to monitor only, respond, or engage?

- Monitor only
- Respond to posts
- Engage in conversation

## CONTENT MODERATION PROCESS



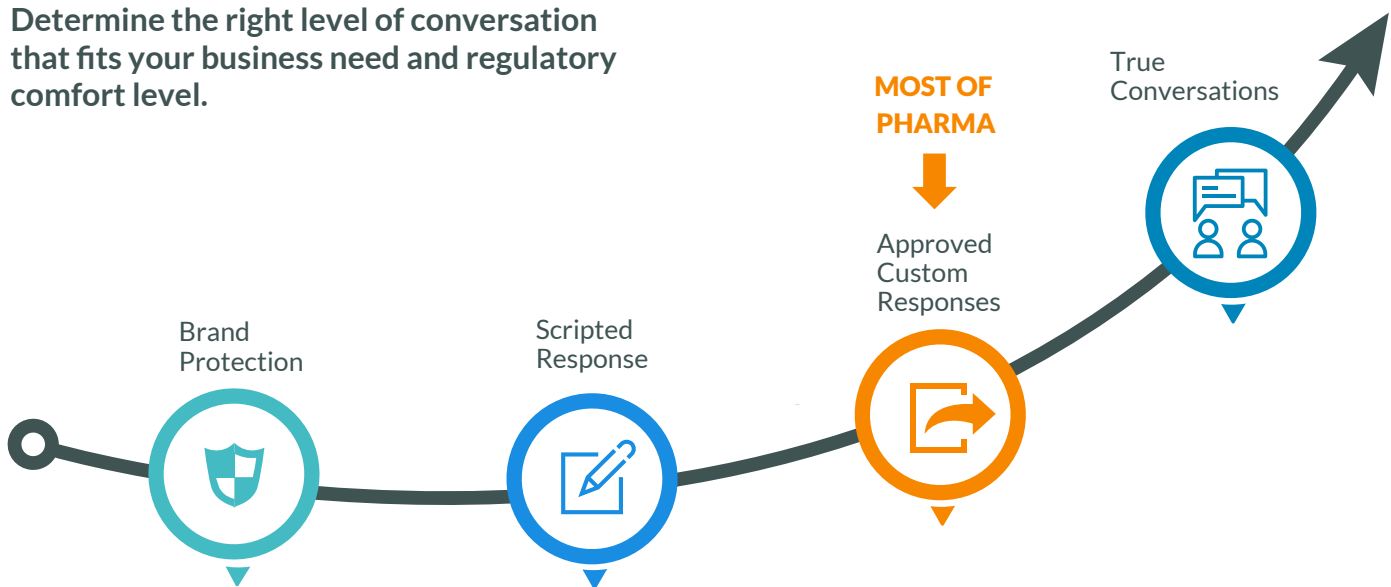
### 7. How quickly do you respond?

- Seconds
- Minutes
- Hours
- Days
- Don't plan to respond (not recommended for engagement programs)

### 8. Do you plan to respond to negative, positive or all comments?

- Negative comments
- Positive comments
- All comments regardless of sentiment

Determine the right level of conversation that fits your business need and regulatory comfort level.



|             |                         |  |  |   |
|-------------|-------------------------|--|--|---|
| DESCRIPTION | Remove unwanted content | Respond to expected questions with a scripted response | Response is custom and personalized to each person but approved by manager | Team is able to craft, in real time, custom and personalized response |
| EXAMPLE     | SPAM                    | Redirection:<br>General queries<br>More info           | Answer includes person's name, context and non-robotic answer              | Custom response with fastest possible response                        |

No matter how many answers you can anticipate, there will always be a need for custom responses. Creating agreements with your approval teams will vastly improve your response time for custom responses.

## FAST TRACK / ACCELERATED RESPONSE PROCESS

| CONTENT TYPE         | DEFINITION  | APPROVERS & PROCESS   |
|----------------------|---|---|
| <b>FULL APPROVAL</b> | <ul style="list-style-type: none"> <li>Content that is about the customers, not the brand, designed to elicit participation from and among the participants</li> </ul>  | <ul style="list-style-type: none"> <li>Approved by the full group of brand, safety and legal team members</li> <li>Leverages content approval tool</li> </ul>   |
| <b>FAST TRACK 1</b>  | <ul style="list-style-type: none"> <li>Any response that mentions a third party of one of the brands or business units, or references any public figure, or includes any PII should be approved by both the Legal and Brand teams.</li> </ul>                       | <ul style="list-style-type: none"> <li>Approved by legal and brand teams. Select team members have agreed to review via email in set time goals.</li> <li>Via email with alert to time sensitivity alert.</li> </ul>  |
| <b>FAST TRACK 2</b>  | <ul style="list-style-type: none"> <li>Responses to questions that don't have an existing answer, or the answer needs changes in order to be relevant. This also includes social responses that do not include direct mention of the brand or a product.</li> </ul> | <ul style="list-style-type: none"> <li>General responses to questions that don't meet the FT1 or Full approval can be approved by the brand team.</li> <li>Via email with alert to time sensitivity alert.</li> </ul> |

### 9. What is your crisis / risk mitigation plan?

While we never plan for an increase in negative comments, it's important to be prepared. Remember this can range from simple feedback on a piece of content all the way to a full-blown social crisis.

| RISK LEVEL                 | DESCRIPTION  |  |   | BENCHMARKS  |
|----------------------------|--|--|---|---|
| <b>LOW:<br/>LEVEL 1</b>    | A series of complaints or issues that begins to look like a trend  | A single brand mention or issue that has a story with significant gravity and outrage that it will likely spread rapidly | A social crisis within the brand's industry or product space that has the potential to spread | <ul style="list-style-type: none"> <li>0-4 a year</li> <li>Benchmarks: Pharma (Branded, Disease state and corp), Lg retail, CPG, banks, technology</li> </ul> |
| <b>MEDIUM:<br/>LEVEL 2</b> | Repetitive posts on a single topic in a set time period and with a certain passion level on a single or on multiple social channels  | A concern that is gaining momentum and following on a single or on multiple social channels                              |   | <ul style="list-style-type: none"> <li>0-1 a year</li> <li>Same benchmarks</li> </ul>   |
| <b>HIGH:<br/>LEVEL 3</b>   | Explosive volume of comments on a single or related topics with high passion levels. The content or audience is aggressively growing. Usually a high risk topic with high momentum and high spread often to various channels (FB, Twitter, Blog, etc.) |  |   | <ul style="list-style-type: none"> <li>1 every few years</li> <li>Same benchmarks</li> </ul>  |

# Crises Management Process

To prepare your organization, go through the following steps.



# Next Steps — Getting to “Yes”

1.

How will you get approval for this change or new strategy within the organization?

2.

Have you developed a vision that helps communicate the project goals and outcomes?

3.

Which people need to contribute, review, approve and allocate budget?

4.

Which departments need to be notified before implementation?

5.

Do you have sufficient resources to achieve your stated outcome?

# Where to Start?

Evaluating and planning social marketing strategies can be challenging. Begin by considering the specific outcomes you want your program to accomplish when evaluating social media efforts within the context of a larger marketing plan.

## NEED HELP PLANNING OR EXECUTING YOUR VISION?

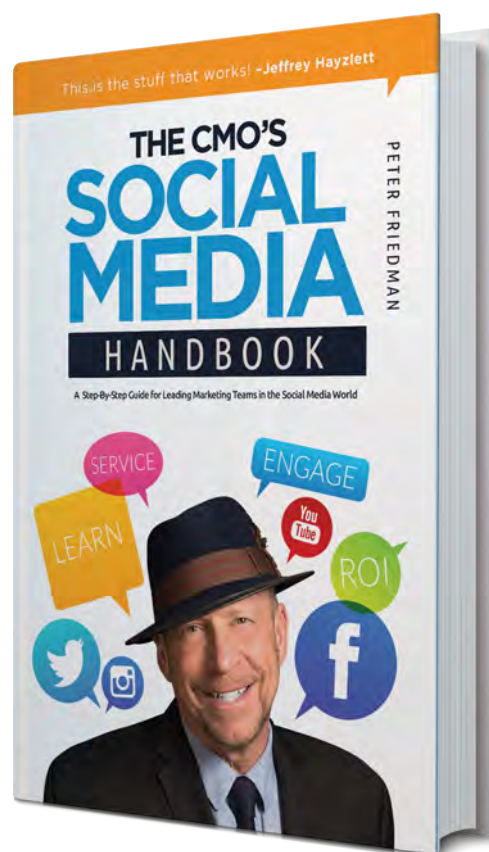
LiveWorld has helped pharma marketers navigate social marketing changes to derive meaningful business value with compliant programs. We can help you do the same.

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