



THE CRE PROFESSIONALS SOCIAL MEDIA ACTION PLAN

A 4-step guide on how to get up and running with social media and how to use it to differentiate yourself, generate business and advance your career.

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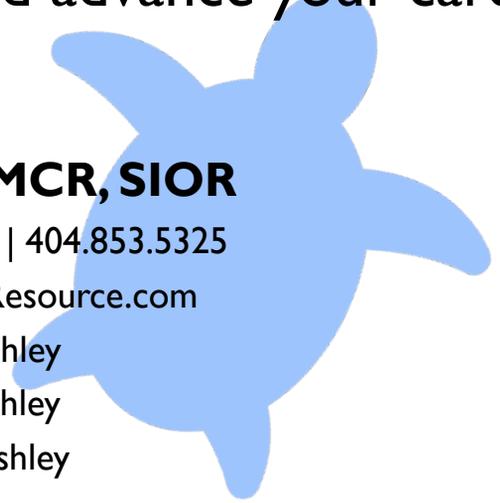
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INTRODUCTION

In recent years, there has been an ever-growing chorus of conversations about social media. One of the most frequent lines of discussion revolves around how to effectively engage in this online world. Forward-thinking service providers want to turn social media from a noun into a verb and make it work for them.

However, many are confused with the new language and the new marketing landscape. Learning a lexicon of terms like “hashtag” or “Klout score” is not as hard as one might think. It just takes a little focus. This pamphlet includes a brief dictionary of common social media terms.

Even more important than the lingo is the “Why?” Why should you spend time on this and, if you do, what will you accomplish? The analogy we use is one of a carpenter who is more worried about his hammer and saw than the house he is building. Let’s plan what marketing “house” to build, and the tools can follow.

Finally, as in every business initiative, there needs to be some accountability. While most of the tools in social media are free, you are most certainly investing your time. One common mistake that busy professionals make is to set up accounts on Twitter, LinkedIn and others, and then not consistently engage in using the tools. This is like joining a health club but never showing up! Planning what you actually DO in social media is an important part of your success.

I hope you find this short on-boarding kit to be helpful. I also know that you can differentiate yourself from the competition and drive real-world dollars to your production by the effective use of social media in your marketing plan.

See you online,

Ken Ashley



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I will be the first to tell you that there is no “right” way to “do” social media or content marketing. In fact, the more you personalize and make it your own, the better it will be. People want to see and get to know the authentic you – not some contrived made-up persona.

Think of this like going to lunch with an important business relationship. You may have some marketing messages to convey, but most of the lunch is sharing fun things about your own life and listening carefully to what they have to say.

Also, life isn't all business. Feel free to sprinkle in hobbies, pastimes, family and other things you feel passionate about.

This guide contains four sections. At the end of the first two sections is a completed example based on my own real-life experience.



TABLE OF CONTENTS

In Step 1: Prepare, we discuss forming a strategy around your target audience, developing your brand, then determining what you will actually say online. Select one or more tools to experiment with (note the index and knowledge center at the end of this document). You also begin to select people you would like to “follow” or listen to online.

In Step 2: Setup, we offer some high-level advice on setting your tools up. Here’s a pro tip: on almost any question or problem I can possibly think of, there are great YouTube “how to” videos. If the steps in this guide don’t resonate, simply pop open YouTube and you will be an expert in no time.

In Step 3: Engage, OK, you may have been to a seminar, read this pamphlet and watched a bunch of YouTube videos. But now is time to jump into the pool. Pick a tool and get in there!

In Step 4: Looking Back, you’ll realize return on your investment is hard to track. I admit it. But you will have accomplished some things to be proud of. You are thinking critically about your business as you post about your expertise. You are learning from those around you – globally – in your specialty. You yourself are becoming a brand that people can Google and learn about.

The metrics in Section 4 are much like a workout plan. You need to record your reps to keep you on track. But the goal at the end of the day is to get and stay active.



STEP I: PREPARE

- * Target Audience
- * Brand
- * Format
- * Frequency
- * Schedule
- * Goals
- * Listening



STEP 1: PREPARE

Action steps guiding you from social media basics to full engagement.

Topic:	Outcome/Status/Next Steps				
<p>Target Audience</p> <ul style="list-style-type: none"> Who are your existing clients? Which companies or industries are you pursuing? 					
<p>Brand</p> <ul style="list-style-type: none"> How will you speak to your audience? What are your audience's likes/dislikes? What do they need help with or want to know? For an example, consider the "Four Corners" idea. The Four Corners will help determine what you will and won't want to talk about in social media. What is your non-interruption marketing strategy? 	<div data-bbox="634 938 1339 1166" style="border: 2px solid #4a7ebb; padding: 10px;"> <p>Your Four Corners:</p> <table border="1" style="width: 100%; height: 100%;"> <tr> <td style="width: 50%; height: 30px;"></td> <td style="width: 50%; height: 30px;"></td> </tr> <tr> <td style="width: 50%; height: 30px;"></td> <td style="width: 50%; height: 30px;"></td> </tr> </table> </div> <p>For an example, see page 7</p>				
<p>Format</p> <ul style="list-style-type: none"> What social media outlets do you want to use and where will you start? <div data-bbox="102 1599 599 1765" style="display: flex; justify-content: space-around; align-items: center;">    </div> <div data-bbox="197 1676 519 1765" style="display: flex; justify-content: space-around; align-items: center;">   </div>					



STEP 1: PREPARE

Continued.

Topic:	Outcome/Status/Next Steps
<p>Frequency</p> <ul style="list-style-type: none"> ▪ How often will you blog, tweet, post, etc.? ▪ What frequency makes the most sense for you and your audience? ▪ Don't worry about quotas ▪ Different platforms, different expectations 	
<p>Schedule</p> <ul style="list-style-type: none"> ▪ Plan out what you will post and on what days/times. ▪ Consider using a calendar to plan and stay on track. <i>Calendar provided on the next page.</i> ▪ Hootsuite is a great tool to schedule posts. ▪ Just don't over-schedule. Presence matters. 	
<p>Listening</p> <ul style="list-style-type: none"> ▪ Decide what you want to follow. ▪ Look for industry trends. ▪ Search key words and terms occasionally to find trends. ▪ Find influencers, competitors and clients to follow. ▪ Tag active accounts where appropriate. 	
<p>Goals</p> <ul style="list-style-type: none"> ▪ What do you want to achieve and how does this fit in your monthly plan? ▪ How will you measure your success? ▪ Consider business drivers like revenue, leads, customers, brand awareness, thought leadership, etc. ▪ Use websites like twittercounter.com or Klout to keep track of your progress & provide accountability. ▪ Consider other related goals, such as LinkedIn endorsements or "Likes" 	



STEP 1: PREPARE

Your Social Media Calendar					
	Monday	Tuesday	Wednesday	Thursday	Friday
Week 1					
Week 2					
Week 3					
Week 4					
Week 5					

Note: Many apps and online tools exist to help schedule tasks. Here are a few examples:

Online

[Smartsheet](#)

[Droptask](#)

[2Do](#)

Apps

[PocketInformant](#)

[Fantastical 2](#)

[Sunrise](#)



STEP 1: PREPARE

Use ideas from my presentation as a starting point.

Topic:	Ken's Example:				
<p>Target Audience</p> <ul style="list-style-type: none"> Who are your clients? Which companies or industries are you pursuing? 	<ul style="list-style-type: none"> Midcap U.S. companies with \$200 million - \$2 billion in sales Corporate Executives, especially CFOs, who are busy/stressed, full of FUD (fear, uncertainty, and doubt). Interested in trends Maybe need a "Knowledge Center" to learn more about CRE CRE geeks (Yes, they do exist) 				
<p>Brand</p> <ul style="list-style-type: none"> How will you speak to your audience? What are your audience's likes/dislikes? What do they need help with or want to know? For an example, consider the "Four Corners" idea. The Four Corners will help determine what you will and won't want to talk about in social media. What is your non-interruption marketing strategy? 	<ul style="list-style-type: none"> Non academic #CRE updates focusing on trends and useful information to CFOs <div data-bbox="654 962 1359 1213" style="border: 1px solid #0056b3; padding: 10px; margin: 10px 0;"> <p style="text-align: center; background-color: #0056b3; color: white; padding: 5px;">Ken's Four Corners:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; text-align: center; padding: 5px;">Positive News</td> <td style="width: 50%; text-align: center; padding: 5px;">Economic News / Management Consulting</td> </tr> <tr> <td style="width: 50%; text-align: center; padding: 5px;">Technology</td> <td style="width: 50%; text-align: center; padding: 5px;">Macro CRE News</td> </tr> </table> <p style="text-align: center; margin-top: 5px;"> ← Creative Entertaining → Positive </p> </div> <ul style="list-style-type: none"> Not included (for example): Politics, adult humor, pop culture, sports 	Positive News	Economic News / Management Consulting	Technology	Macro CRE News
Positive News	Economic News / Management Consulting				
Technology	Macro CRE News				
<p>Format</p> <ul style="list-style-type: none"> Which social media outlets do you want to use and where will you start? Remember to start small, then expand. 	<ul style="list-style-type: none"> The BIG FOUR: <ul style="list-style-type: none"> LinkedIn Twitter YouTube Blog 				
<p>Frequency</p> <ul style="list-style-type: none"> How often will you blog, tweet, post, etc.? What frequency makes the most sense for you and your audience? It's not necessary to inundate people to expose your brand. 1 message 2-3 times per day, Monday-Friday. 	<ul style="list-style-type: none"> 2-4 times per day, Monday through Friday No more than 5 Tweets or LinkedIn posts per day to avoid "spam" label, although you can Tweet more often if you have good ideas/content. #tweetresponsibly Goal to blog 2 times per month 				



STEP 1: PREPARE

Continued.

Topic:	My Approach:										
<p>Schedule</p> <ul style="list-style-type: none"> Plan out what you will post and on what days/times. Consider using a calendar to plan and stay on track. Be consistent. 	<ul style="list-style-type: none"> Daily messaging at 5:45 – 6:00 AM. Prescheduled in Hootsuite. Blog posted on Mondays, at least twice a month Calendar example: <table border="1" data-bbox="658 710 1348 846"> <thead> <tr> <th>Monday</th> <th>Tuesday</th> <th>Wednesday</th> <th>Thursday</th> <th>Friday</th> </tr> </thead> <tbody> <tr> <td>Best of List</td> <td>Deal/Media Reviews</td> <td>Personal Experience Stories</td> <td>Editorial related to your theme</td> <td>Fun commentary or guest post</td> </tr> </tbody> </table>	Monday	Tuesday	Wednesday	Thursday	Friday	Best of List	Deal/Media Reviews	Personal Experience Stories	Editorial related to your theme	Fun commentary or guest post
Monday	Tuesday	Wednesday	Thursday	Friday							
Best of List	Deal/Media Reviews	Personal Experience Stories	Editorial related to your theme	Fun commentary or guest post							
<p>Listening</p> <ul style="list-style-type: none"> Decide what you want to follow. Find influencers, competitors and clients to follow. Look for industry trends. Search key words and terms occasionally 	<ul style="list-style-type: none"> Follow local and national CRE news sources, clients and other influencers Retweet important or interesting information to share with followers Search for #CRE-related hashtags daily to stay on top of trends. With Hootsuite/Tweetdeck, just create columns for these searches and keep them active. 										
<p>Goals</p> <ul style="list-style-type: none"> What do you want to achieve and how does this fit in your monthly plan? How will you measure your success? Consider business drivers like revenue, leads, customers, brand awareness, thought leadership, etc. Use websites like twittercounter.com or Klout to keep track of your progress & provide accountability. 	<ul style="list-style-type: none"> Non-interruption marketing on a daily basis Perception as a thought leader Differentiation Measurements <ul style="list-style-type: none"> Unique hits on the blog Comments on blog Google Analytics can show you not only how much traffic you're getting, but where it's coming from, how long it's staying and where they're clicking. Facebook Insights Twitter Analytics Retweets Shares/Likes on LinkedIn and Facebook posts Klout score All of the above leads to the bigger goal: Audience Engagement 										



STEP 2: SETUP

📍 LinkedIn

📍 Blog

📍 Twitter

📍 YouTube

📍 Facebook



STEP 2: SETUP

YOU'RE NOT ALONE

Don't think you have to do this all yourself. If you feel the least bit uncomfortable in setting up your social media tools, there are a variety of ways to get help. Here are some ideas to learn more:

- On almost any topic – just ask a question in YouTube or Vimeo and see what response you get.
- For help in “punching keys” to set up blogs, etc., try one of the following to find experts who might be located anywhere in the world. These members of the “shared economy” will often work on projects for just a few dollars to earn extra income. Think of them as the “Uber drivers of the information age.”
 - [eLance](https://www.elance.com)
 - [Guru.com](https://www.guru.com)
 - [oDesk](https://www.odesk.com)
 - [Task Rabbit](https://www.taskrabbit.com)
 - [Freelancer.com](https://www.freelancer.com)



STEP 2: SETUP

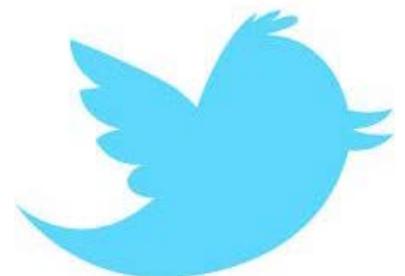
HOW TO GET SET UP ON LINKEDIN:

1. Go to [linkedin.com](https://www.linkedin.com)
2. Create your user account
3. Build a content-rich profile
4. Upload your profile picture
5. Link to your website, blog, Twitter, etc.
6. Join groups & participate
7. Add connections
8. Monitor updates (Example - Your clients or colleagues change jobs/promotions)



HOW TO GET SET UP ON TWITTER:

1. Go to twitter.com
2. Create your user account
3. Upload your profile picture
4. Create a custom background to stand out
5. Follow others to build a network
6. Add a “Follow Me” button to your email signature
7. Search to see what’s trending
8. Tweet!





STEP 2: SETUP

HOW TO GET SET UP ON FACEBOOK

1. Go to [facebook.com](https://www.facebook.com)
2. Create your personal user account
3. Build your profile
4. Upload your profile picture and banner picture
5. Link to your website, blog, Twitter, etc.
6. “Add Friends” & “Like Fan Pages” to build a network
7. Share status updates, pictures, videos, articles, etc.

HOW TO SET UP A FACEBOOK FAN PAGE

1. From your personal account, create a Fan Page (link on menu at bottom of screen)
2. Build your profile
3. Upload your profile picture and banner picture
4. Link to your website, blog, Twitter, etc.
5. Invite Friends to “Like” your page and build a fan base
6. Share relevant status updates, pictures, videos, articles, etc.





STEP 2: SETUP

HOW TO GET SET UP ON YOUTUBE



1. Go to youtube.com. You can create an account or log in with your Google account credentials.
2. Look at the top right-hand corner of the screen to find your username. Next to your username is a pull-down arrow; click My Channel from the options and follow the instructions.
3. To edit the appearance of your page, click on My Channel then find the Channel Settings button on the left side.
4. To post videos, click Upload on the top menu bar.

HOW TO SETUP A BLOG



1. Choose a web hosting provider who will store your blog content and display it to visitors (i.e. Wordpress or Blogger).
2. Get a domain name (i.e. godaddy.com).
3. Upload WordPress/Blogger to your hosting account and associate it with your domain name.
4. Install Your Theme.
5. Set up your blog's sidebar, footer and header.
6. Configure your settings.
7. Make sure your comment moderation settings are set up correctly.
8. Create your pages and links.
9. Begin posting!

There are many people who will help you set up for a small fee. I have hired wonderful talent on site, like Elance and TaskRabbit.



STEP 3: ENGAGE!



STEP 3: ENGAGE

- Use your planned content and preparations to begin tweeting, posting topics for discussion on LinkedIn, blogging, etc.
- Engage Genuinely
 - Sharing content is important, but don't forget to listen to the posts and content from others.
 - Absorb new information and create valuable content from it.
 - Be sure to humanize your brand. It is OK to include content about your life outside of CRE occasionally, as this adds dimensionality to you.
 - Listen to what your network is saying - what bothers or concerns them, what will lighten their load, etc.
- Quality over Quantity - If you can't maintain the quality, reduce your frequency of posts.



STEP 3: ENGAGE WITH LINKEDIN

- Don't always be too quick to send a request to connect on LinkedIn, even after meeting someone in your field. If you met, chatted and had a good rapport with a potential business contact, it will typically be welcomed. But if it was a brief meeting without much conversation between the two of you, be careful about how/if you follow up on LinkedIn.
- If you do reach out to connect, personalize your invitation. Do not stick with the default "I'd like to add you to my professional network" message. Reference how you met, and share something memorable from the conversation. Let them know the meeting mattered to you, and they'll be more likely to respond positively to your invitation.
- Though there's a lot of statistical noise out there, skill "endorsements" matter in much the same way SEO on your website might matter – it's about helping hiring managers and recruiters find you. They may not look like much, but they could help you turn up in the right person's search.
- What matters even more, though, is personal Recommendations. Collect as many as you can, particularly from your managers and higher-ups in the organization. Typically, the time to do this is when you or the other person is moving on to a new job – so don't burn those bridges. A sincere, well-written recommendation attached to a previous job greatly enhances your profile. If you're in a position to do so, offer to write one in return.

MORE SOLID LINKEDIN ADVICE ON THE WEB:

- [Chris Handy at ThinkHandy with general advice](#)
- [Alyssa Sittig on status updates](#)
- [Target Marketing Magazine's Jeff Molander on what not to do](#)

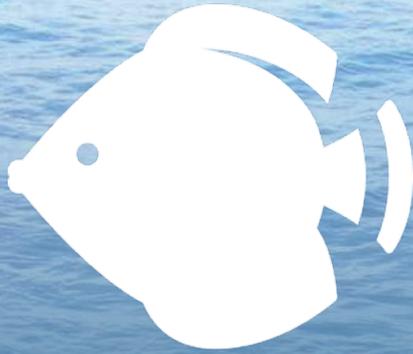


STEP 3: ENGAGE WITH TWITTER

- Presence matters – a lot. This doesn't mean you have to stare at the constant stream even in your sleep. Nor does it mean you can't ever schedule tweets. What it means is that Twitter will only work for you if you work for it. Be there. Respond to tweets. Have conversations. Be funny. Retweet good stuff. In short – Engage!
- Remember, tweets are fleeting. The vast majority of anyone's followers aren't watching Twitter at any given time, and they won't ever see your tweet. Got a new blog post? Don't be afraid to tweet the link to it 3-4 times that first day, with a different message each time. Also feel free to tweet older posts as well, particularly if they suddenly become topical in some way.
- Identify active Twitter participants in your area of interest, or even just on the periphery of it, and tag their account in tweets when relevant. If you write a blog post about a certain company's workspace, find their Twitter handle and mention them in the tweet, especially if they're active. If so, they'll see it, and there's a good chance they'll share it if they're not too big. That's what we call amplification.
- If Twitter is something you want to use often, make sure you employ a dashboard like Tweetdeck or Hootsuite. Not only will they give you several columns to use for different feeds like your timeline, mentions, direct messages, lists, etc., but you can schedule tweets, do searches, follow/unfollow, and report accounts directly from the platform.

MORE SOLID TWITTER ADVICE ON THE WEB:

- [C&W's Barbi Reuter on marketing commercial real estate via social](#)
- [The Marketing Ninjas' Casey Cleary on increasing Twitter engagement](#)
- [Vertical Response's Derek Overby on quick tips for building engagement](#)



STEP 4: RESULTS & LOOKING BACK



STEP 4: RESULTS & LOOKING BACK

- Look at your goals to see how you have done in comparison.
 - Did you reach your goals?
 - Where did you struggle?
 - What actions were most successful?

Goal:	Achievements:	What can be done to improve:
Target Audience Reached		
Brand Recognition		
Formats Used		
Frequency Achieved		
Schedule Adhered To		
Time Spent Listening		



STEP 4: RESULTS & LOOKING BACK

ENGAGEMENT TRACKER					
	Month 1:	Month 2:	Month 3:	Month 4:	Month 5:
Twitter					
# of Followers					
# of Posts					
# of Retweets					
LinkedIn					
Total # of Connections					
# of Shares					
# of Endorsements					
Facebook					
# of Friends					
# of Fan Page Followers					
# of Shares					
YouTube					
Videos Posted					
# of Videos Viewed					
Klout					
Score					



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SOCIAL MEDIA TERMS:

- **Facebook** - Social site to connect and engage with family, friends and colleagues.
- **Fan Page** - A Facebook profile for a business, artist, politician, etc.
- **Status Update** - Anything you want to share via Facebook with your friends or fans.
- **Tag** - Links a person, page, or place to something you post on Facebook, like a status update or picture.
- **Wall** - The space on your Facebook profile where you and your friends/fans can post and share.
- **@** - Used to connect with others or mention someone in a tweet (@kenashley is a tweeter)
- **# or Hashtag** - Used to mark trending keywords or topics (#TAGboston)
- **Retweet** - Share what someone else tweeted with your followers.
- **Trending** - What people are talking about on Twitter. Often denoted by #.
- **Klout Score** - The measurement of someone's overall online influence. The score ranges from 1 to 100 (the higher the score, the better). Measures True Reach, Amplification Probability, and Network Score to represent one's sphere of influence.



SOCIAL MEDIA TERMS:

- **Mention** - Any instance of tagging another account in a tweet.
- **Pin** - Adding a photo to your wall on Pinterest.
- **#FF** - Twitter hashtag that means “Follow Friday.” Used by many people on Twitter to promote other accounts.
- **Hangout** - Google Plus’s live video chatting service.
- **Hootsuite** - One option for live social media management with multiple columns for streams.
- **SEO** - Search Engine Optimization is the method by which you can make your blog/website more attractive to search engines like Google.
- **Link Building** - An aspect of SEO that involves earning inbound links to your blog/website from other well-established sites.
- **Podcast** - A non-streamed webcast, usually via audio and on a particular topic niche, often released regularly from its producer.
- **RSS Feed** - Content publishers can syndicate their feed, allowing users to subscribe to their content and read it from other locations when they want.
- **Crowdsourcing** - Leveraging your online community to assist in services, content and ideas for your business.



SOCIAL MEDIA HELP:

- LinkedIn Help – help.linkedin.com
- Twitter Help – support.twitter.com
- Facebook Account (personal page) – facebook.com/help
- Facebook Account (fan page) – facebook.com/help/pages
- YouTube Help – support.google.com/youtube
- Wordpress Help – en.support.wordpress.com
- Blogger Help – support.google.com/blogger
- Klout Help: [klout.com/#/corp/what is klout](http://klout.com/#/corp/what%20is%20klout)
- Twitter analytics: analytics.twitter.com

Toolkit

- Hootsuite – hootsuite.com
- Tweetdeck – tweetdeck.com
- Unfollowsme – who.unfollowed.me