Getting Started: Marketing Cloud: Social Studio

Accelerator Webinar

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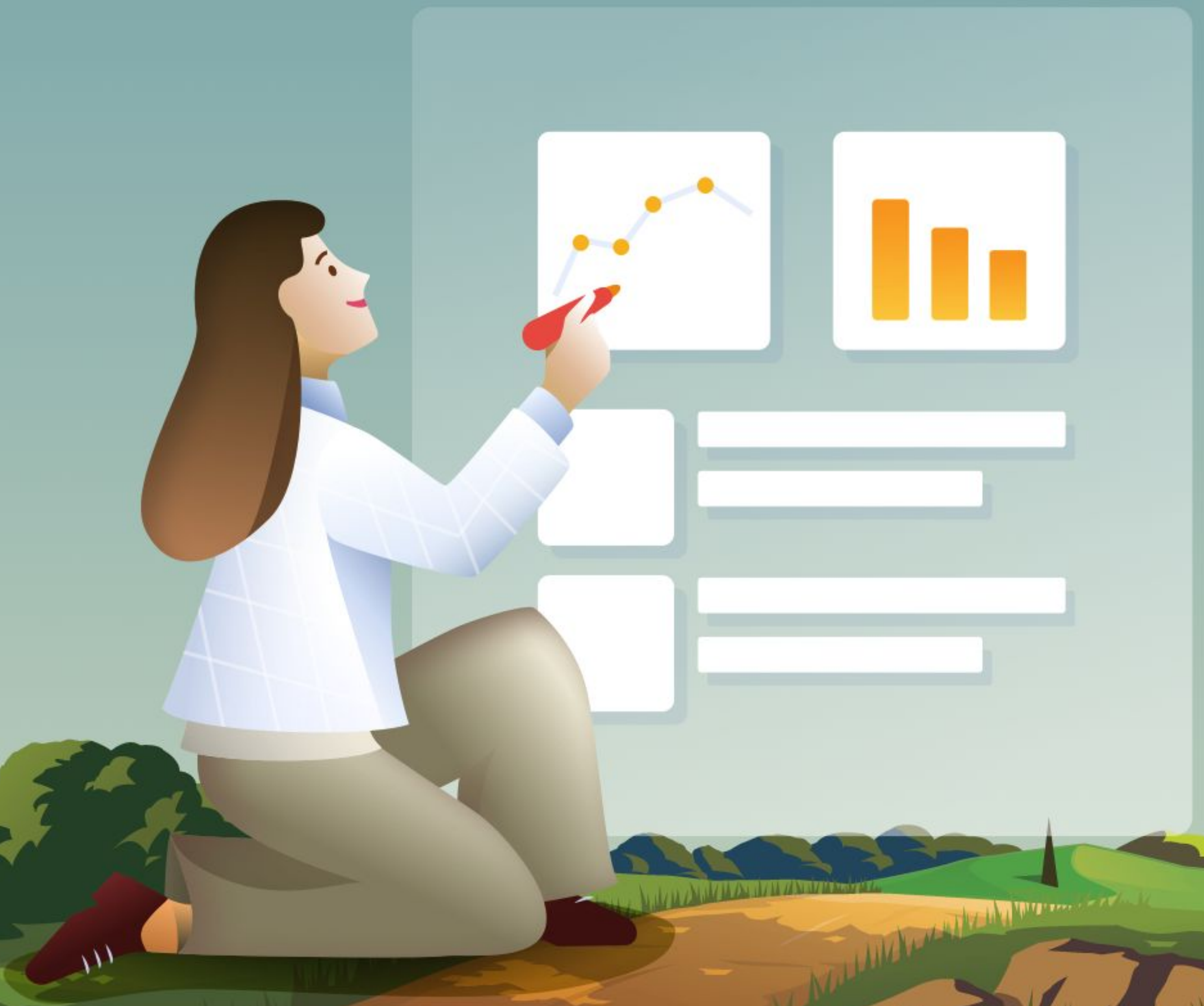
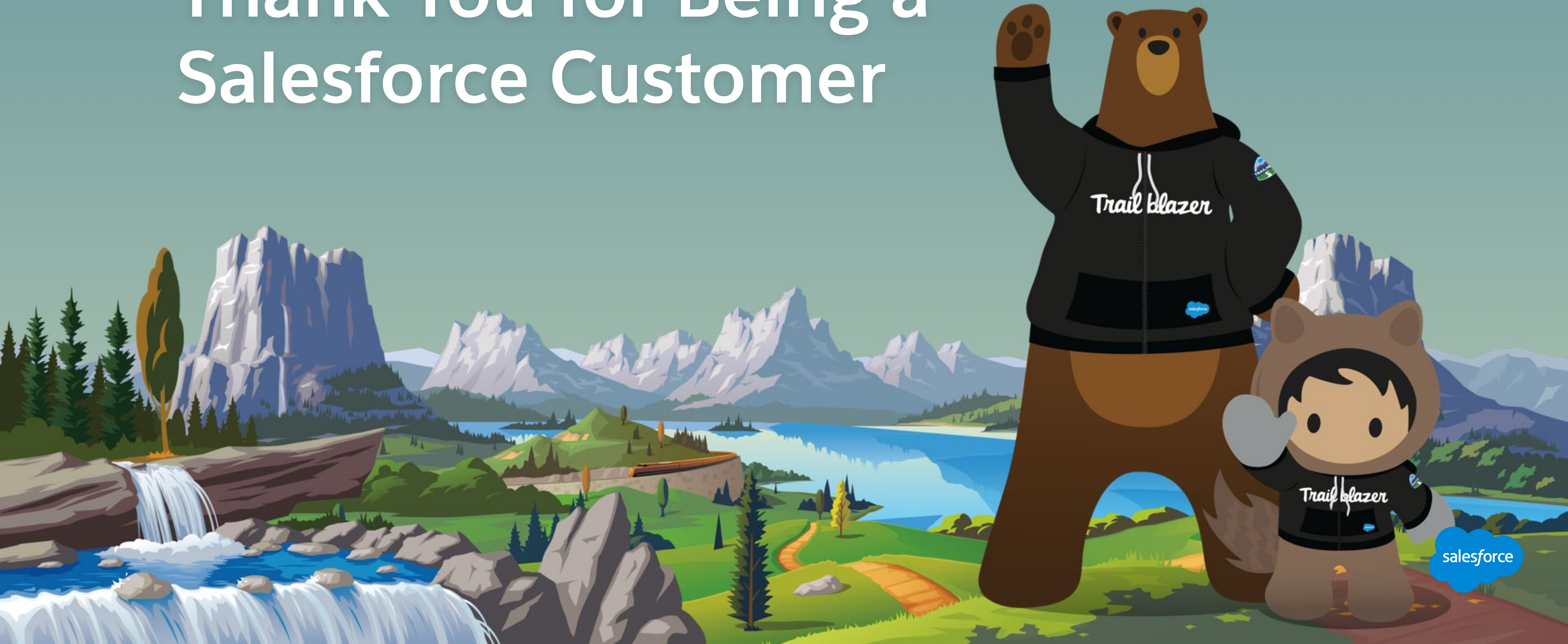
This webinar will begin at 10:00 am PDT



Welcome to this Accelerator LIVE Webinar!

In this 2 hour session, we'll go over the main components of Social Studio (Admin, Publish, Analyze, Engage) and review best practices so you can get the most out of your Salesforce investment.

Thank You for Being a Salesforce Customer



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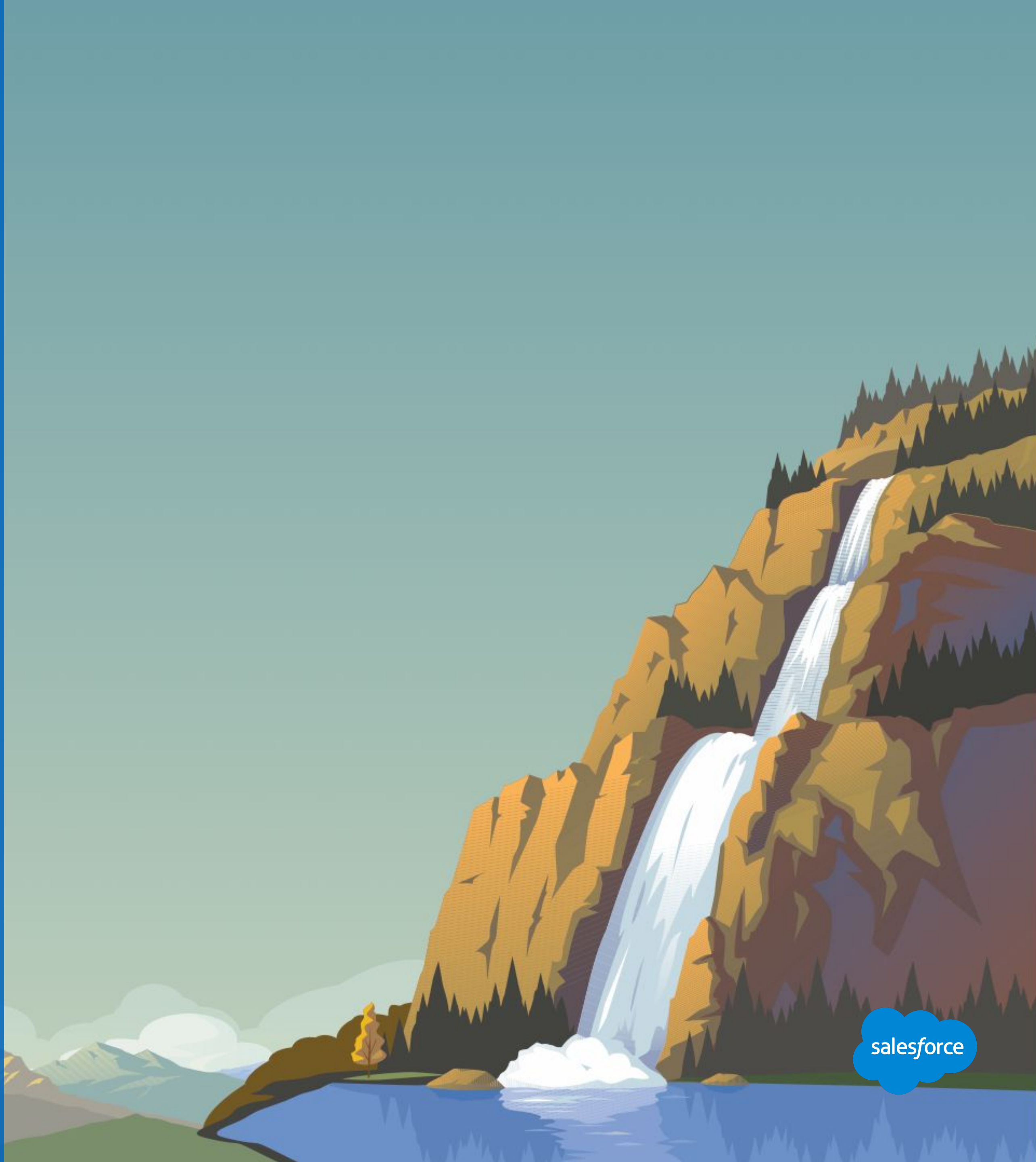
Agenda

- **Live Accelerator Overview and Scope**
  Walk through logistics and review topics covered
- **Social Studio Administration**
  Basics of setting up Social Studio, admin functionality and best practices
- **Social Studio Publish**
  Navigation and best practices
- **Social Studio Engage**
  Navigation & best practices
- **Social Studio Analyze**
  Dashboards, topic profiles, workbenches, reporting & best practices
- **Social Studio Resources**
  Review where to go to get help with Social Studio

Achieving Your Business Outcomes with Accelerators



Accelerator Topics

Core Advertising Studio Functions

Setup and Admin	Publish	Engage	Analyze
Control global settings and use flexible Role Based Access Control to ensure only the right users can execute tasks • Add and Manage Social Accounts • User setup - profiles and permissions • Workspaces - central place to plan, publish, and engage content by dedicated users • Macros	Create, request approval, and schedule content and media across multiple social accounts using gating and targeting • Navigating within Publish • Calendar view, filters, scheduling, and notes • Creating a post - targeting, customizing, and duplicate across networks • Approval Rule Management • Content Performance Reporting	Use real time collaboration to monitor content posted to social accounts and respond, mark for other actions, and assign to others for follow up • Tabs - monitor and engage with posts for different social accounts or topic profiles • Columns - customize views with filtering • Post Routing and Workflow • Attributes - classification, labels, and notes • Engagement Macros	Understand what is being said, the overall tone of social discussions and how well certain topics and trends are performing • Dashboards - management, types, cards, and layout • Workbenches - using datasets for deeper analytic view • Review topic profile trends and performance • Understand brand sentiment

Overview

What challenge are we solving for you?

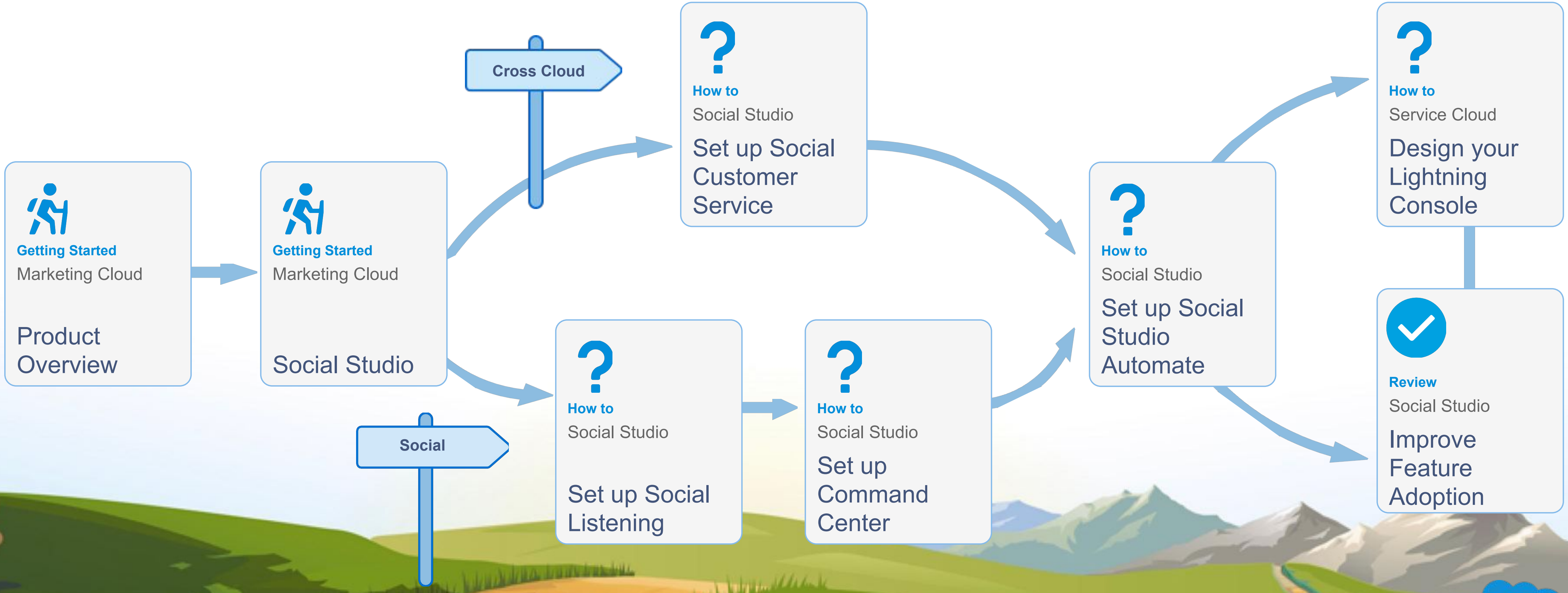
A Salesforce Specialist will help you:

- Understand the main features of Social Studio.
- Get specific answers to your questions through the chat window or a follow up 1:1 session.
- Decide what to do next to help you continue on your road to success.

Accelerators: Plan Your Accelerator Journey

Which Accelerators are best for your objectives?

Designated Salesforce contacts can open accelerators via Help & Training Portal. Your Salesforce account team can also open accelerators for you! Visit the Accelerator library here!



Social Customer Service

Start your path to Social Customer Service Success!

Accelerator Catalog

Start Here

Set Up
Social Listening

- Increase campaign effectiveness
- Increase actionable visibility into marketing KPIs

Set Up
Social Customer Service

- Increase marketing and service team efficiency
- Increase customer retention

Set Up
Social Studio Automate

- Deep dive of Social Automation tool
- Increase efficiency

Keep Going

Excellent for Social Studio & Service Cloud customers looking to launch their Social Customer Service programs

salesforce

Additional Accelerators

If you have a Premier Success Plan we encourage you to request additional Accelerators by typing the name of the Accelerator into the chat.

Admin

Set up, permissions, workspaces & other features

Workspaces: Setup & Governance

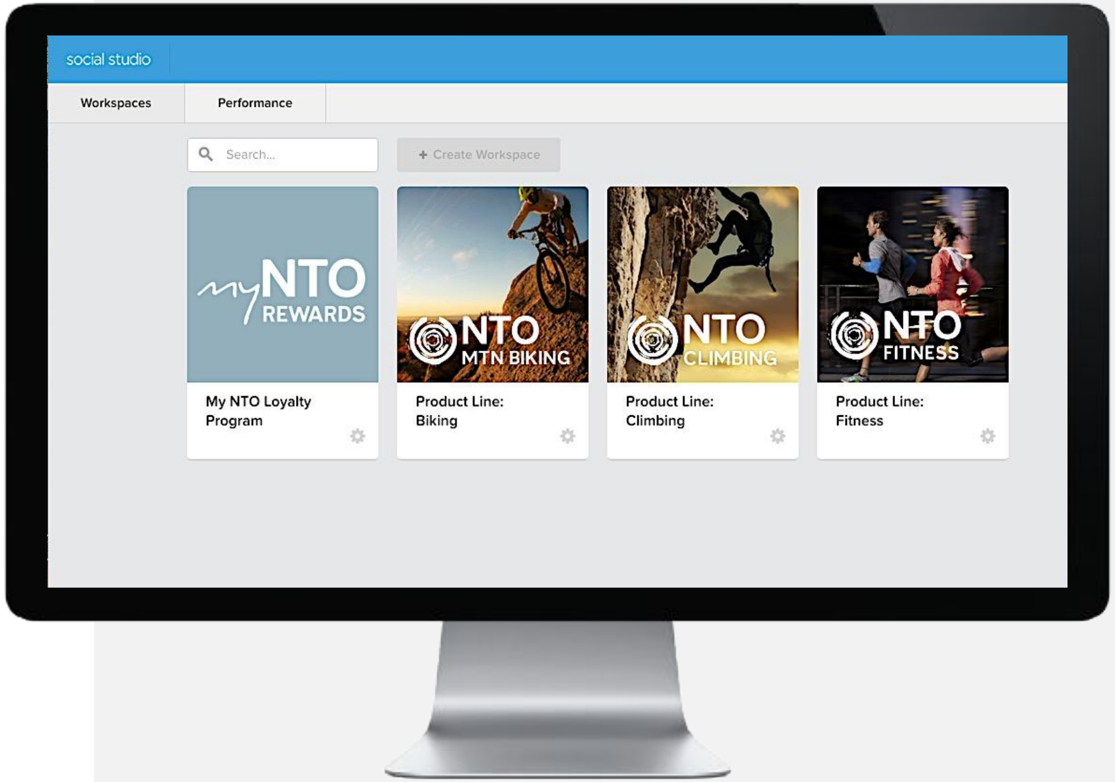
Workspaces are a core component in Social Studio and enable customers to establish their own groups or "working spaces" and can be utilized by the following ways:

Common use cases and configurations:

- Workspaces for external agencies
- Workspaces by brand
- Hub and Spoke/COE
- Franchise, Global Hub
- Workspaces by country or geographical region
- Workspaces by function (such as PR, Services,
- or Marketing)
- A combination of the above

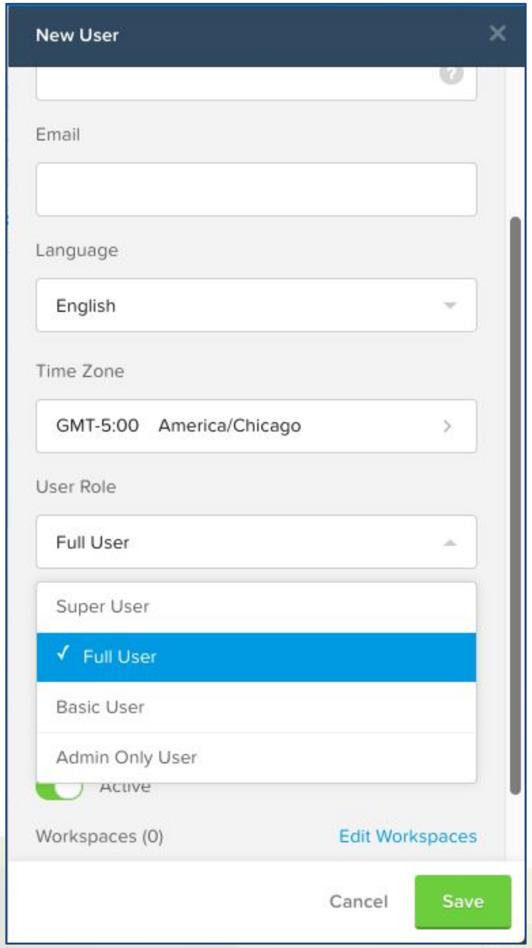
Setting up a new Workspace:

- Be sure to add relevant users, Social Accounts and Topic Profiles to your Workspace
- Ensure appropriate permissions and approval rules, macros and templates are set

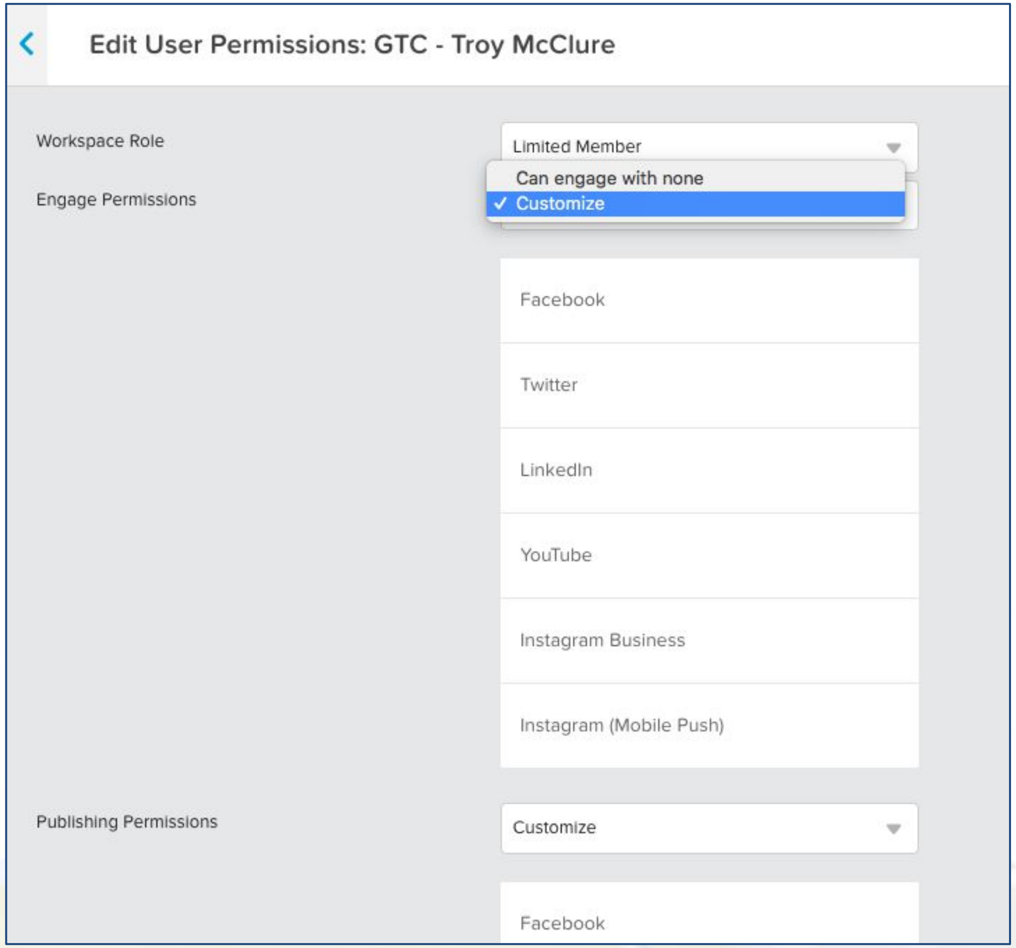


Roles in Social Studio

User Roles: Allows for Provisioning and user creation, and defines admin actions a user can take in a tenant.



Workspace Roles: Define the actions a user can take on social accounts within a workspace.



User Roles: https://help.salesforce.com/articleView?id=mc_ss_user_roles.htm&type=0

Workspace Roles: https://help.salesforce.com/articleView?id=mc_ss_workspace_permission_levels.htm&type=5

Tenant Roles in Social Studio

✓ Permission Granted

✗ Permission Denied

Contain permissions for the management of resources which are typically the functions of Create, View, Edit and Delete.

Action	Admin Only	Super User	Full User	Basic User
Add Workspace	✗	✓	✓	✗
Manage Workspace Settings	✗	✓	If Workspace Admin	If Workspace Admin
Register Social Accounts in Tenant	✓	✓	✓	✗
Add Users	✓	✓	✗	✗
Modify User Settings	✓	✓	Own Settings	Own Settings
Create/Edit Macros	✓	✓	Can Edit/Create their own	✗
Create and Manage Topic Profiles (TPs)	✓	✓	✓	✗
View Topic Profiles (TPs)	✓	✓	Only TPs they created themselves, or that have been shared through a Workspace	Only TPs that have been shared through a Workspace
View Workspace Content incl. Calendar and Performance	✗	✓	For Social Studio Workspaces the user can access	For Social Studio Workspaces the user can access
Create and Manage Source Groups	✓	✓	✓	✗
View Source Groups	✓	✓	Only Source Groups they created themselves, or that have been shared through a Workspace	Only Source Groups that have been shared through a Workspace

Workspace Roles

Workspace Permissions Reference

WORKSPACE MEMBER ROLE	DESCRIPTION
Admin	Super Users are automatically granted Admin rights to all workspaces in the tenant. • Manage users, social accounts, permissions, settings, labels, and macros. • Publish content to all accounts. • Create approval rules.
Contributor	• Publish and Engage with any social account in the workspace. • View access to any social account.
Limited Member	• Publish and Engage rights granted on an account-by-account basis by workspace admin. • View content within a specified workspace including the calendar and performance. • View and manage personal information and anything shared with them.

https://help.salesforce.com/articleView?id=mc_ss_workspace_permission_levels.htm&type=0

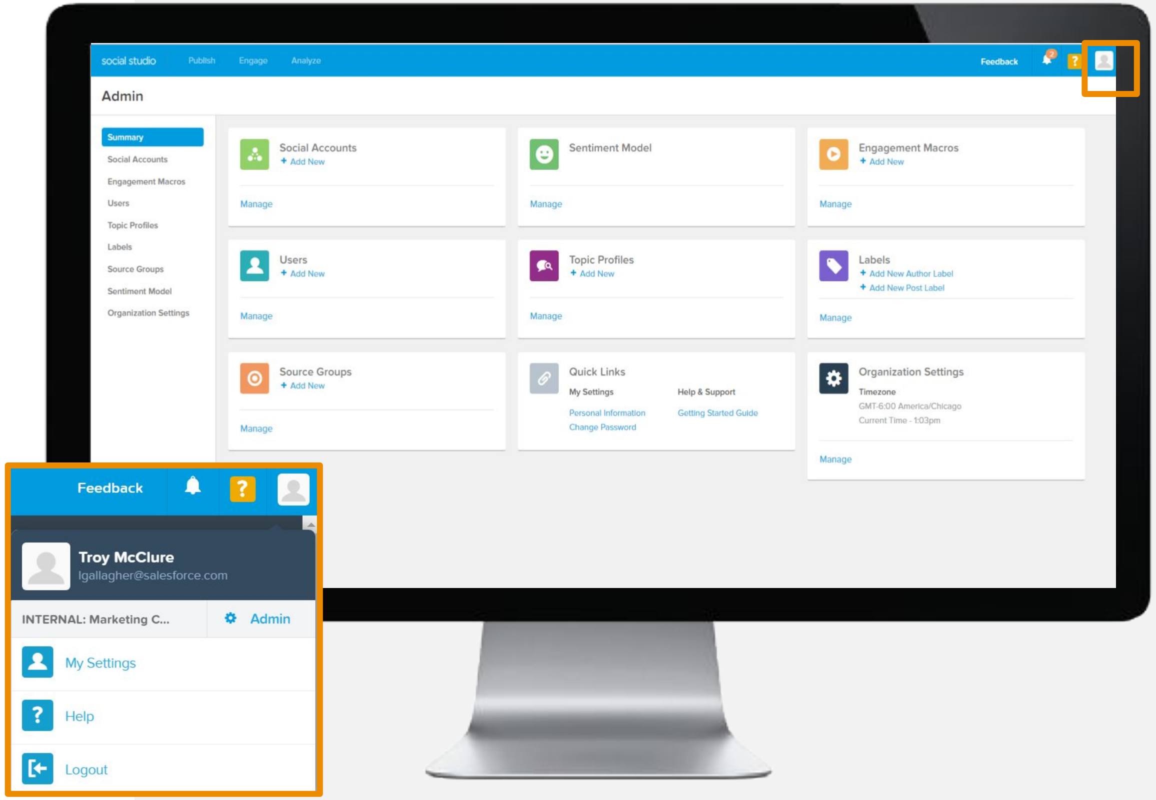
Tenant Administration

“Right Hand Settings”

Clicking the picture icon in the top right hand corner will bring you to the “My Settings”, “Help”, and “Logout” sections of the tool

The “Admin” button will bring you to a Administration Summary tab where you can adjust tenant wide settings such as:

- Social Accounts
- Users
- Topic Profiles
- Engagement Macros



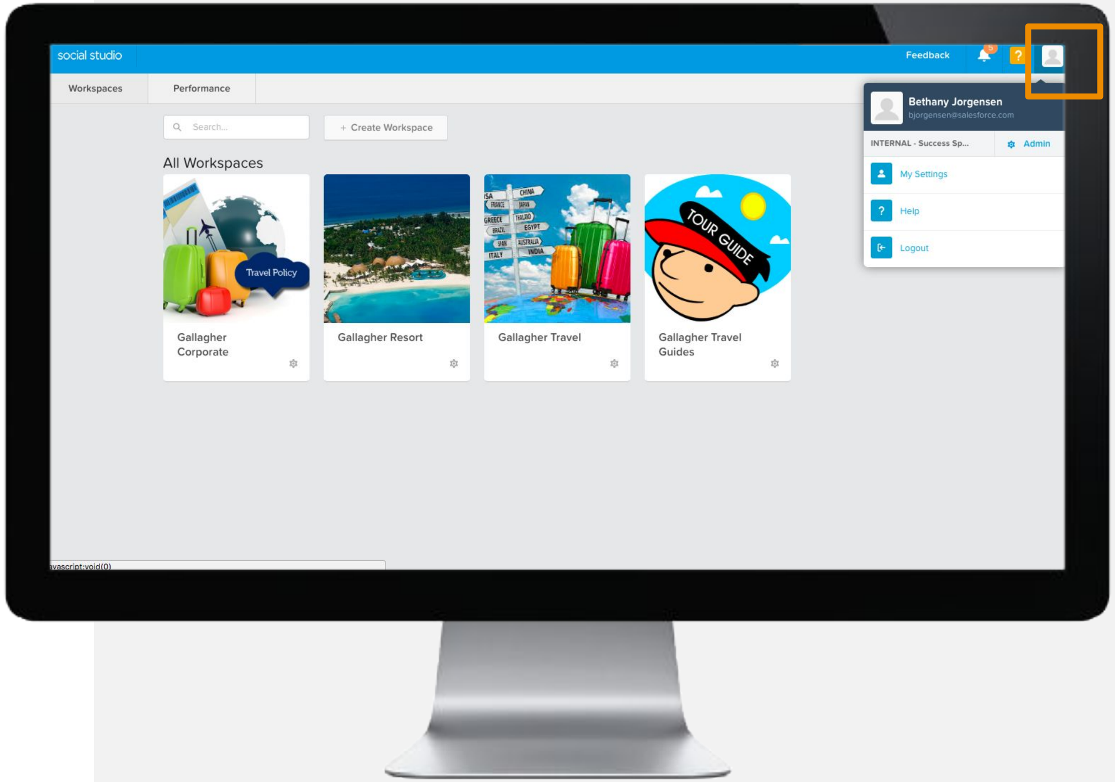
Workspace Administration

“Left Hand Settings”

Within a workspace, click the workspace name in the upper left hand corner and select the gear icon

The gear icon will bring you to the “Workspace Settings” screen where you can adjust settings such as:

- Users
- Social Accounts
- Topic Profiles
- Publish Labels
- Approval Rules
- Publish Macros
- Templates



Social Studio Setup Tasks:

- Configure organizational settings
- Create all users with appropriate organization level permissions
- Connect all Social Accounts
- Create all Workspaces
    - Add users, relevant brand social media accounts and Topic Profiles
    - Set Workspace user permissions based on duties performed
    - Create Approval Rules, Engagement and Publish macros, Engage Templates, Publish Labels
    - Topic Profiles, Engagement Macros, Users, & Social Accounts can be placed in multiple Workspaces

Best Practice: Create onboarding email for new users including links to documentation, company policies and procedures

Account Activation Email

Accessing your Account

Hello Troy McClure,

Welcome! You've been granted access to Social Studio for social media management. Your username is:

Username	Troy_McClure_Simpsons

To activate your user account, please click https://socialstudio.radian6.com/signup?key=9827d6f147726117a17c81576de8f27f97a0568f9c6ca0bbe73b2529e85c20deb5b28d3305c6864d45b6525e08c77967c76f2ab973d511b5b3310a65a5d37a62 (or the button below) where you will be prompted to choose and verify a password.

Once you have successfully activated your account, we recommend that you record your username and bookmark the application for easy future access:

https://socialstudio.radian6.com

Find everything you need to get started in our Help Portal.

- To add new users to the tenant, you must be either an Admin or a Super User of the account
- Once you have been added in the account, you will receive an email similar to the one on the left
- From there, you will need to activate your user account by clicking on the link and setting your password; once this is done, you will gain access to Social Studio

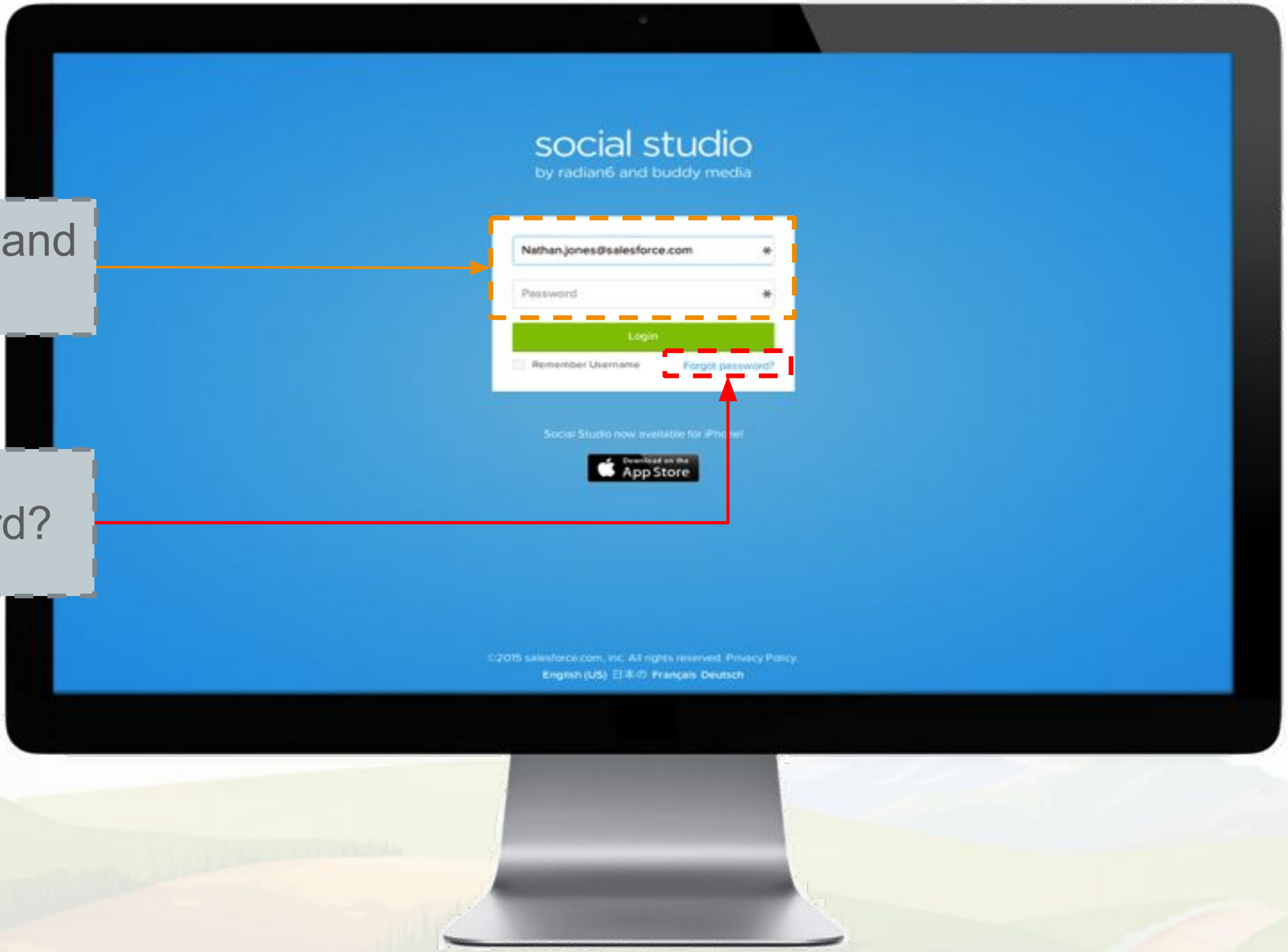
Logging into your Account

Accessing your Account

socialstudio.radian6.com

Enter username and password

Forgot password?



Governance Best Practices

Onboarding:

- Require ***everyone*** with access to Social Studio to go through training
- Direct users to marketingcloudpremier@salesforce.com if they have questions

Tenant Permissions:

- Keep Super Users to 2-3 people maximum
- Consider giving Full User access to just managers
- Give everyone else Basic User access
- Only provide Sentiment Model access to Super Users

Workspace Permissions:

- Keep Workspace admins to 2-3 people maximum
- Only provide Contributor permissions to those you trust to publish or engage on any channel connected to the Workspace
- Give everyone else Limited Member access and customize what channels they can publish and engage

Organizational Settings:

- Uncheck ability for Full/Basic users to create post and author tags

Topic Profiles:

- Create generic public Topic Profiles that everyone can use and assign to relevant workspaces (keeps volume under control)

Best Practices: Admin Maintenance

Task Frequency	Task	Details
Quarterly Tasks	Audit Users	Remove/add necessary users
	Audit Topic Profiles	Monitor EMV/Ensure keywords are relevant
	Audit Source Groups	Add/remove/modify source groups
	Audit Publish Labels	Ensure all labels are current; archive old labels
	Audit Engage Labels	Maintain a list of 10 or fewer labels to streamline filtering & reporting
	Audit Author Labels	Maintain a list of 10 or fewer labels to streamline filtering & reporting
	Audit Publish Macros	Add/remove/modify Publish labels
	Audit Engagement Macros	Add/remove/modify Engagement labels
	Audit Engage Templates	Add/remove/modify Engagement templates
	Audit Approval Rules	Ensure all approvers are current
	Check Active Automate Rules	Ensure all data sources, rules and content libraries are running and current

Publish

Calendar, post creation & other features

Publish

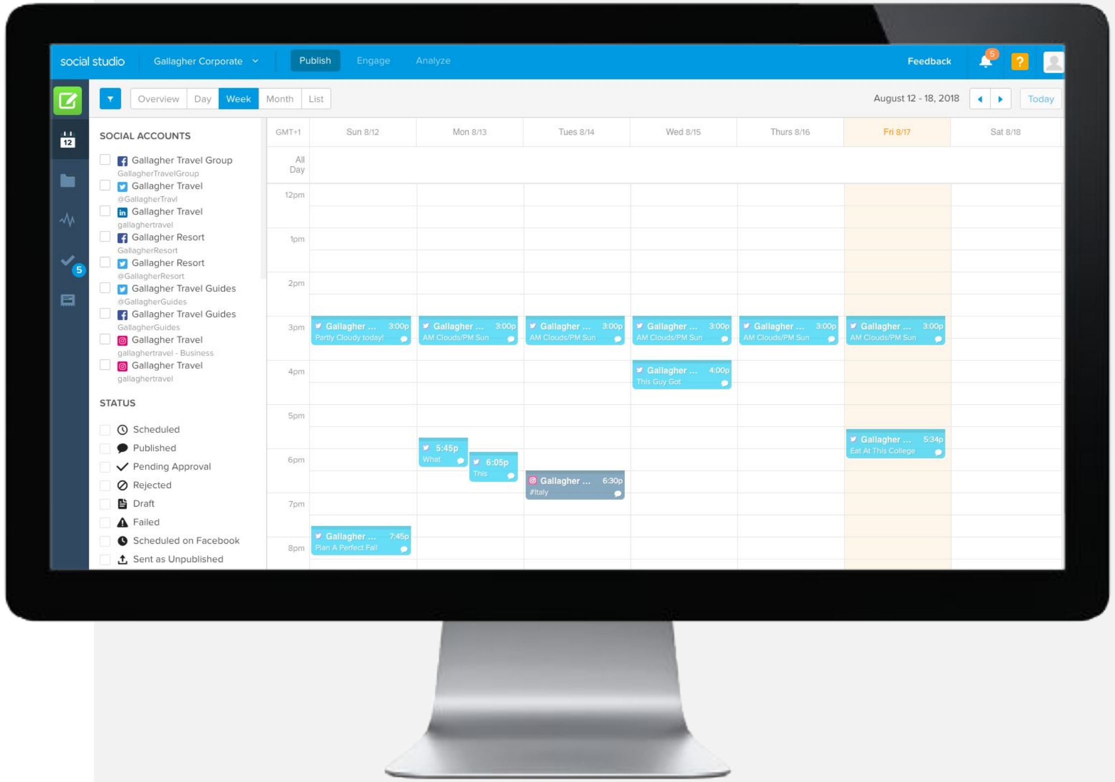
Calendar View

The calendar view is the default screen for Publish

- The calendar can be viewed by day, week, month, list, or overview

The calendar can also be filtered by the following for deeper segmentation:

- Social Accounts
- Status
- Label
- Author
- Media Type

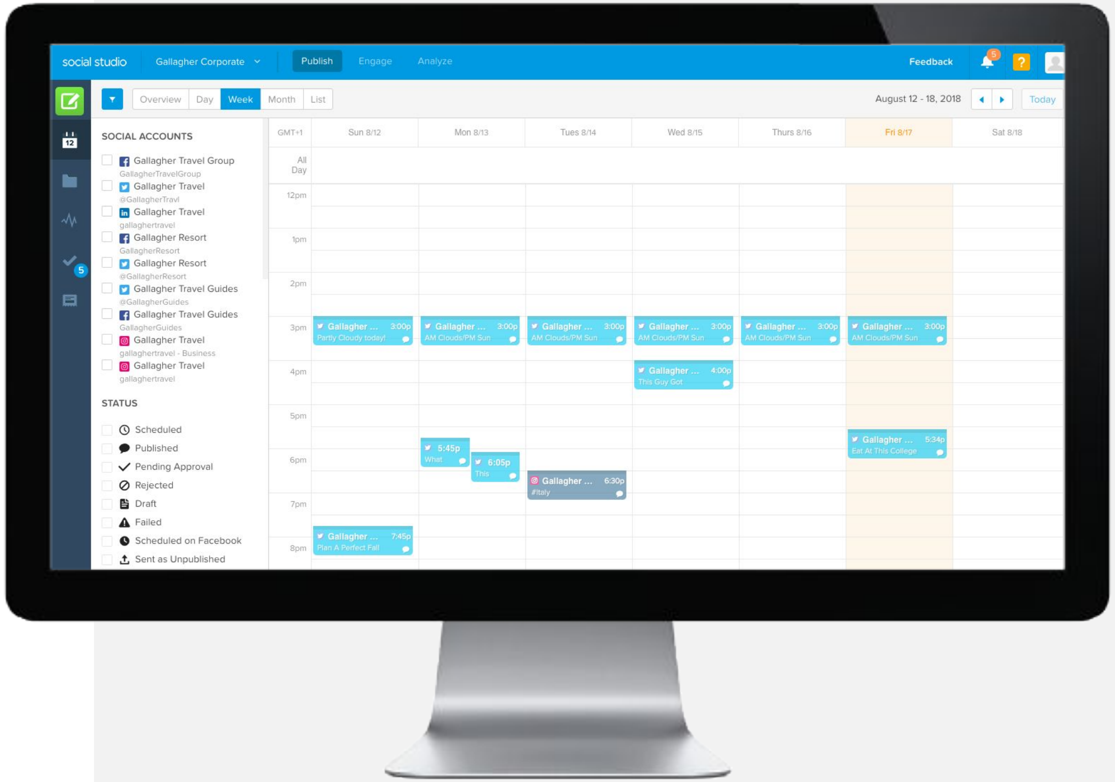


Publish

Navigation Pane

The navigation pane on the far left side of the screen contains the Publish sub tools:

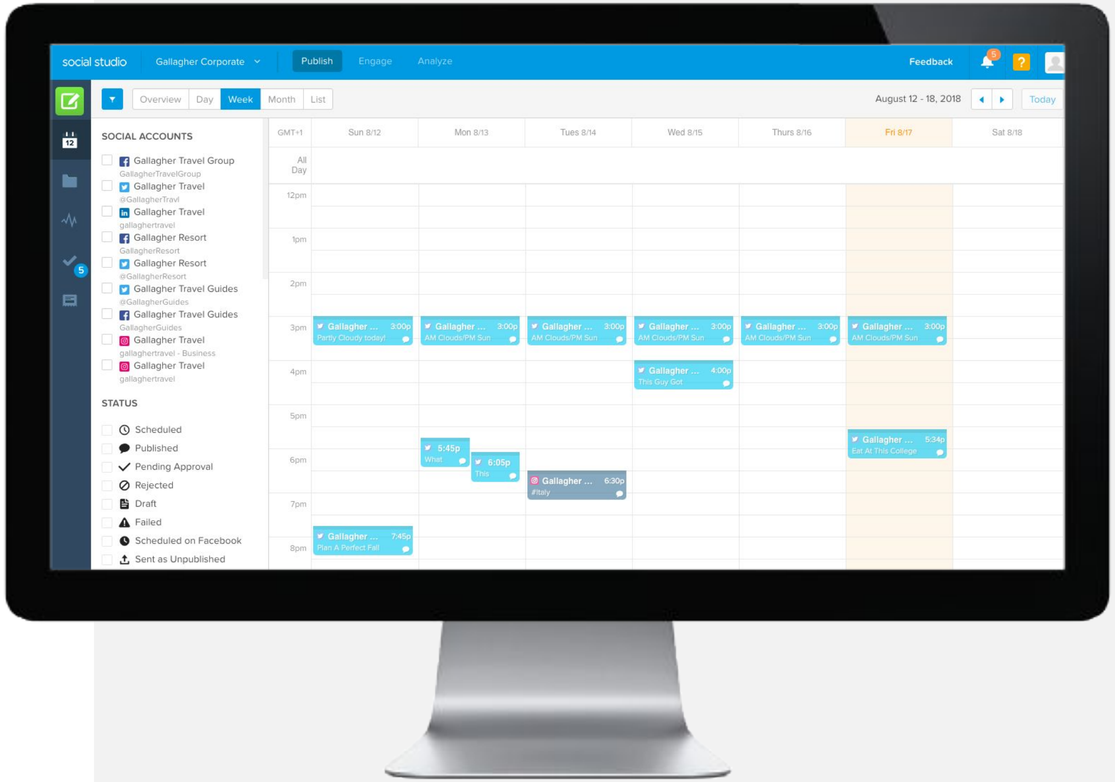
- **Create Content** – Starts the process for creating a post or tweet to the social accounts assigned to workspace
- **Calendar** – Returns to the calendar view if on another screen in Publish
- **Drafts** – Access posts or tweets that were composed but not published
- **Performance** – Access performance summary reports over the past 7 days



Publish

Navigation Pane cont'd

- **Tasks** - Use this to see pending approvals for posts that require approval. Tasks will appear based on Approval Rules where the user is listed as an approver
- **Shared Content** - View or use content created and shared by other workspaces



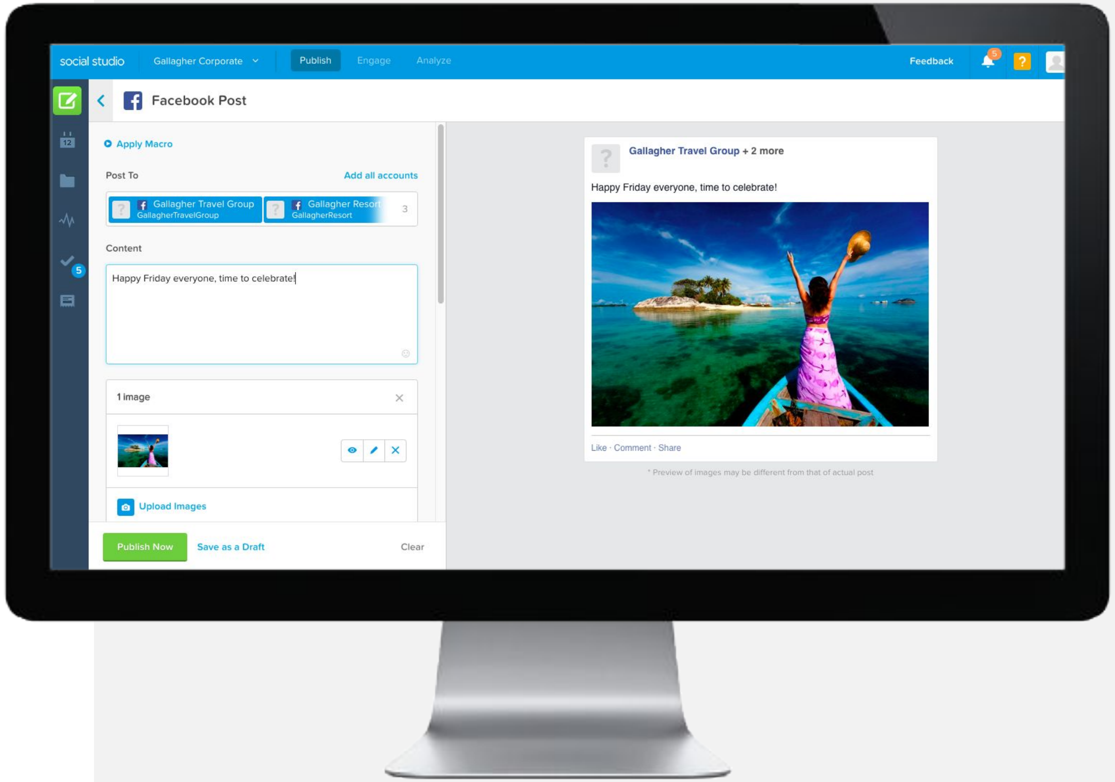
Publish

Creating Content

To publish a post/tweet, simply click directly on a date/time within the calendar view or click the green compose button located in the top left corner

Steps to Simple Publishing:

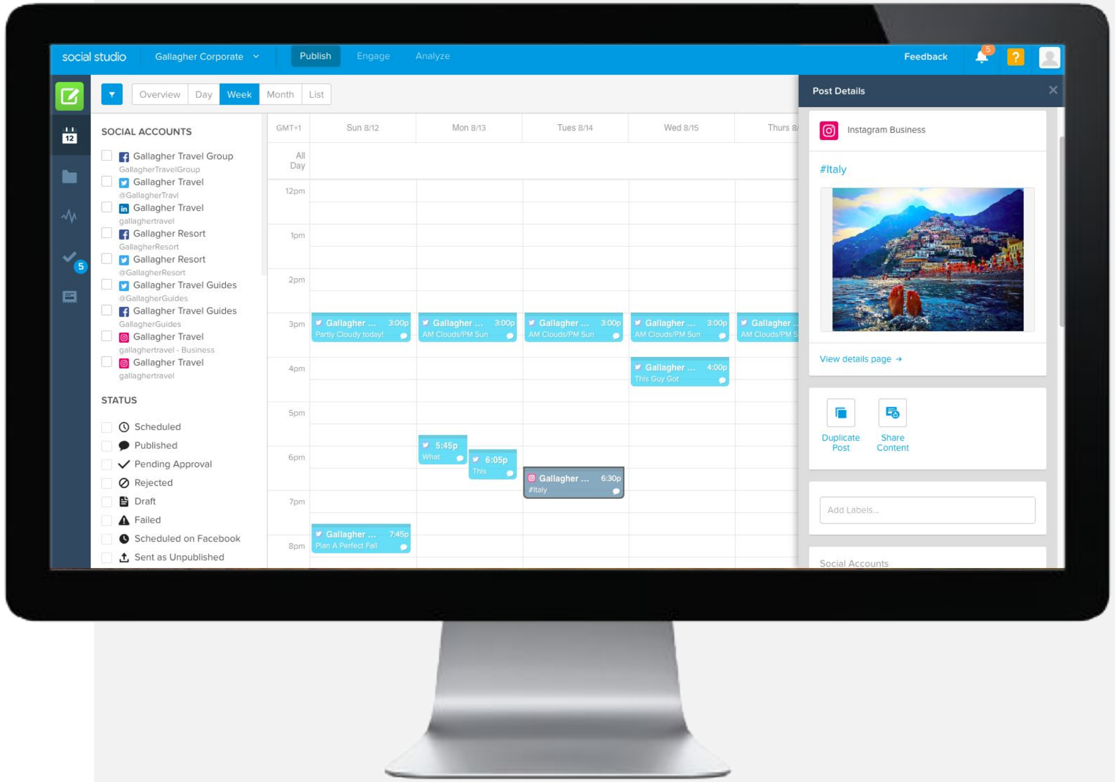
1. Start by selecting the social account you would like to publish to
2. Enter your message in the content window
3. Upload images, videos, or get content from apps
4. Apply Labels for easy reference and reporting (Optional)
5. Set the post/tweet to publish immediately or schedule it for a later date/time
6. Publish now or save as a draft



Publish

Sharing and Duplicating Content

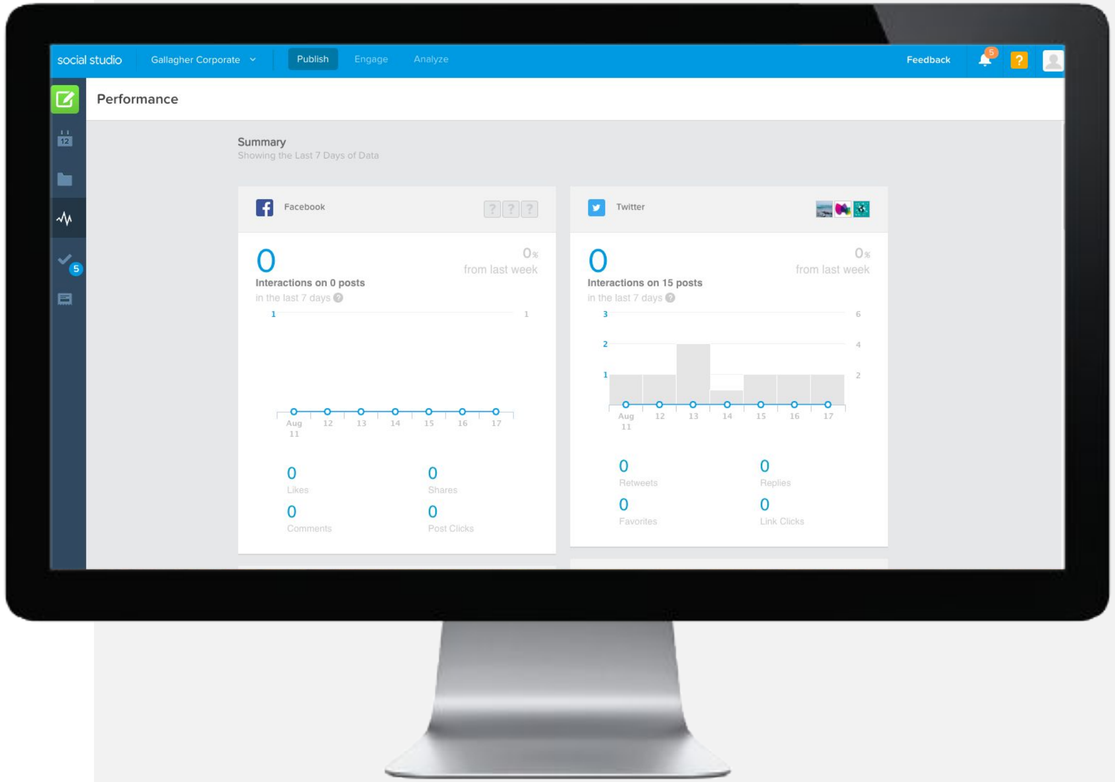
- The Shared Content folder enables users to reuse and modify previously created content, rather than recreate it from scratch each time
- Posts/tweets within the Shared Content folder also contain performance metrics so the best performing content can be reused
- To duplicate a post, simply click on the post in the calendar view and click “Duplicate Post”. From there, you can choose the social network you want to post to and edit if necessary



Publish

Workspace Performance

- The performance reports are based on social accounts within the workspace
- The performance summaries analyze a rolling 7 day window and compare that to the previous 7 days
- You can review each channel (Facebook, Twitter, LinkedIn, etc) separately and customize the view by likes, reach, retweets, replies, views, etc.



Social Studio Resources

Release Notes
Events Calendar
Social Studio FAQs
Social Studio Glossary

Publish Resources

1. Publish in Social Studio (eLearning)
2. Navigate in Publish
3. Adjust Calendar filters and view
4. Collaborate using Notes
5. Create a post
6. Set up Approval Rules
7. Manage post approvals
8. View Content Performance and Reports

Publish Best Practices:

- When using a Publish label, ensure that the label has not already been created
- To duplicate posts in different channels, schedule the first post, then duplicate it and change the channel
- Share content that other teams/users may find helpful and check folder often for posts from other users that performed well
- For LinkedIn posts with images, use a URL to the image to populate image

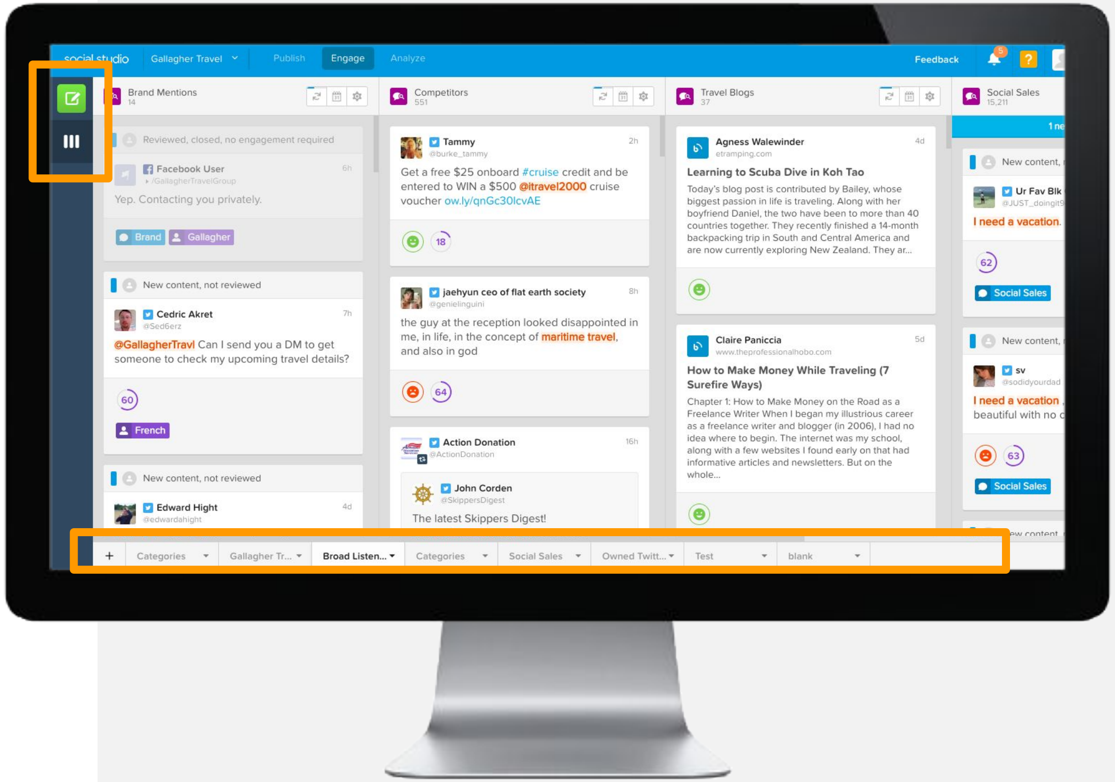
Engage

Connect with your customers where they are

Engage

Navigation

- Engage allows you to see what others are replying to, commenting on, and sharing with your social properties.
- Posts in Engage can be responded to, marked for other engagement actions, or assigned to others on the team to follow up.
- The navigation pane shows the same create content icon as in Publish, as well as Tabs.
- At the bottom of the screen, you will see a display of all of the tabs created under that workspace.



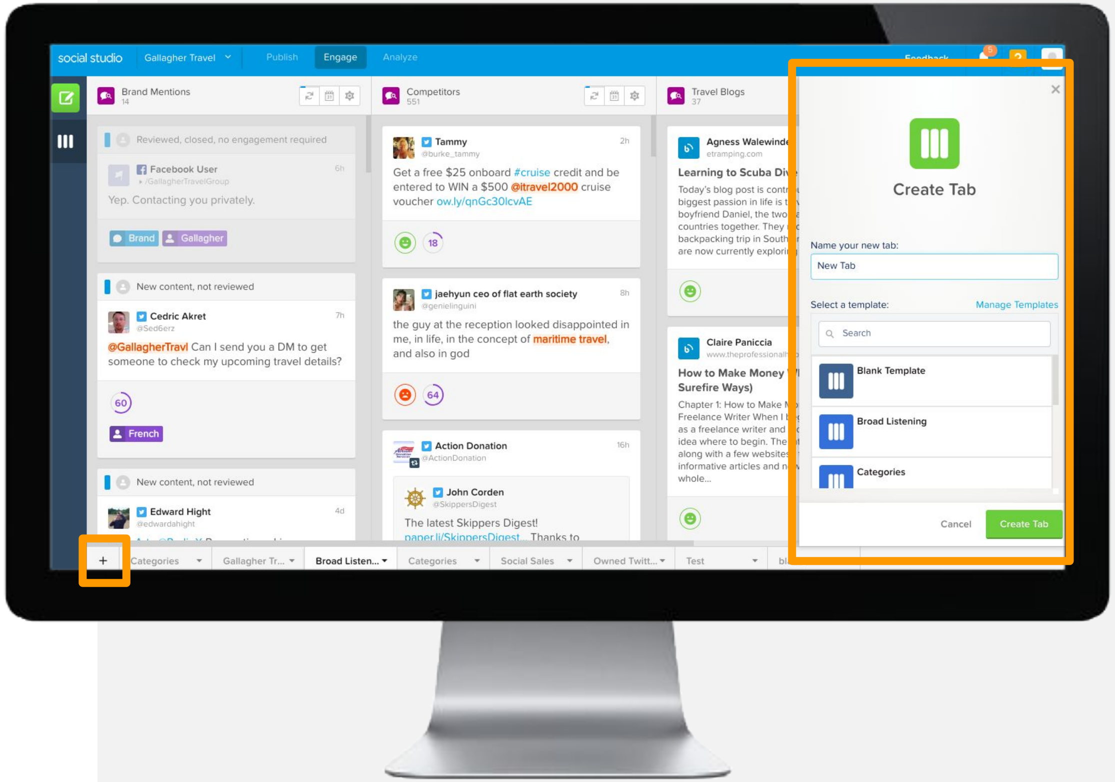
Note: The configuration of your Tabs and how these are displayed are unique to the user. You could have a tab from a template (for use across multiple users) in addition to a tab that has been customized to your use case.

For more information visit: [Engage in Social Studio]

Engage

Creating a Tab

- When you click on the + icon, a tab will appear on the bottom right. From here you can create a new tab or add a template (pre-configured tab)
- When you create a new tab, you will have the option to add information either by social accounts or topic profiles into your column
- When adding a template, simply select one from the list of templates added to the specific workspace or delete all of your existing tabs



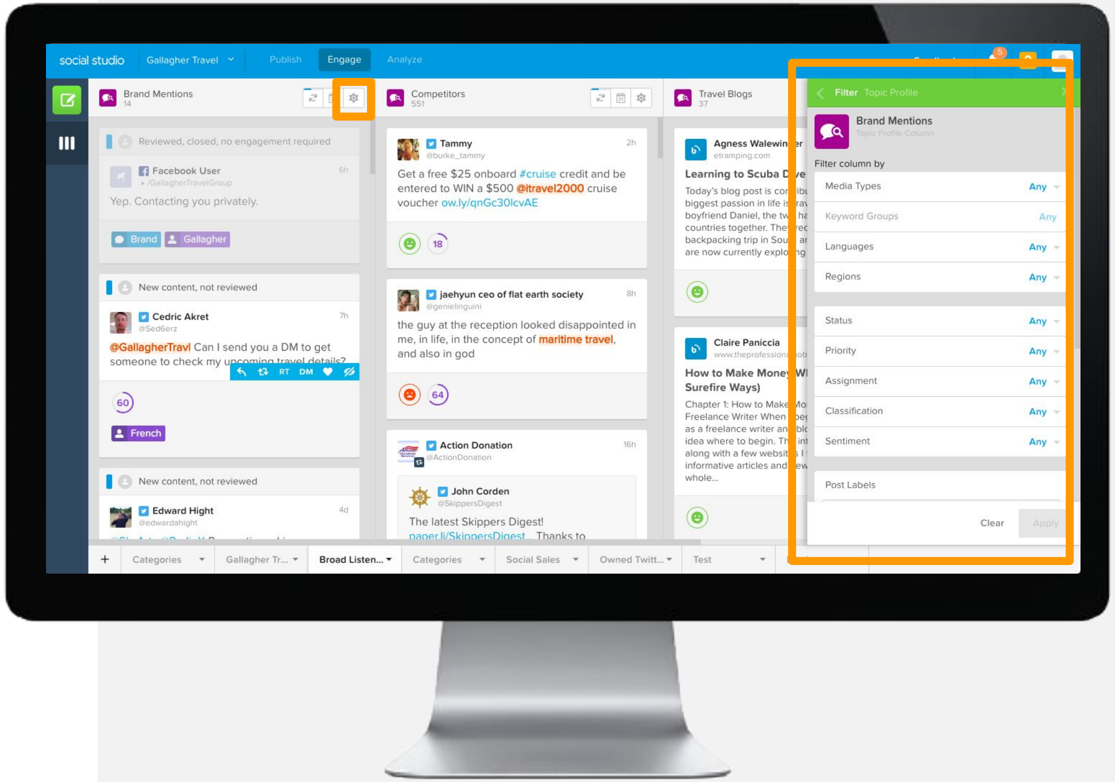
Note: To create templates, you must go to the Admin section of the workspace, configure the columns as per needed use case, save and exit. These will then be available to all users of the workspace

For more information visit: [Engage in Social Studio]

Engage

Column Configuration

- Social accounts and topic profiles can be filtered by clicking on the gear icon at the top right hand side of the column. Filtering options include media types, keywords groups, status, classification, post label, keywords, etc.
- Tab and column configurations will vary depending on the use case



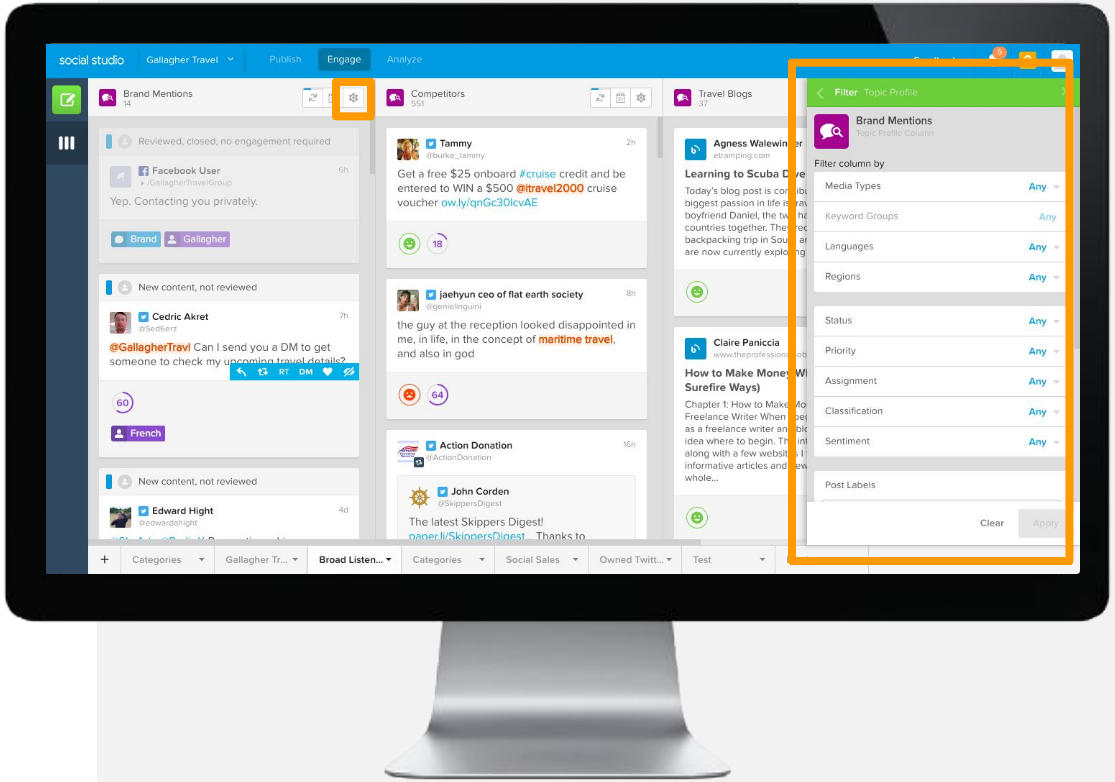
Note: It is a common best practice to create a column on your most visited tab, filtered by assigned to (your name)

For more information visit: [Engage in Social Studio]

Engage

Column Configuration cont'd

- Competitive Listening – Create a tab called Competitive and add a column for each of the competitors being monitored
- Campaign or Event Listening – Create a tab with the campaign's event and have a column for all of the brand's mentions and another one filtered using the name of the campaign as a keyword



Note: It is a common best practice to create a column on your most visited tab, filtered by assigned to (your name)

For more information visit: [Engage in Social Studio]()

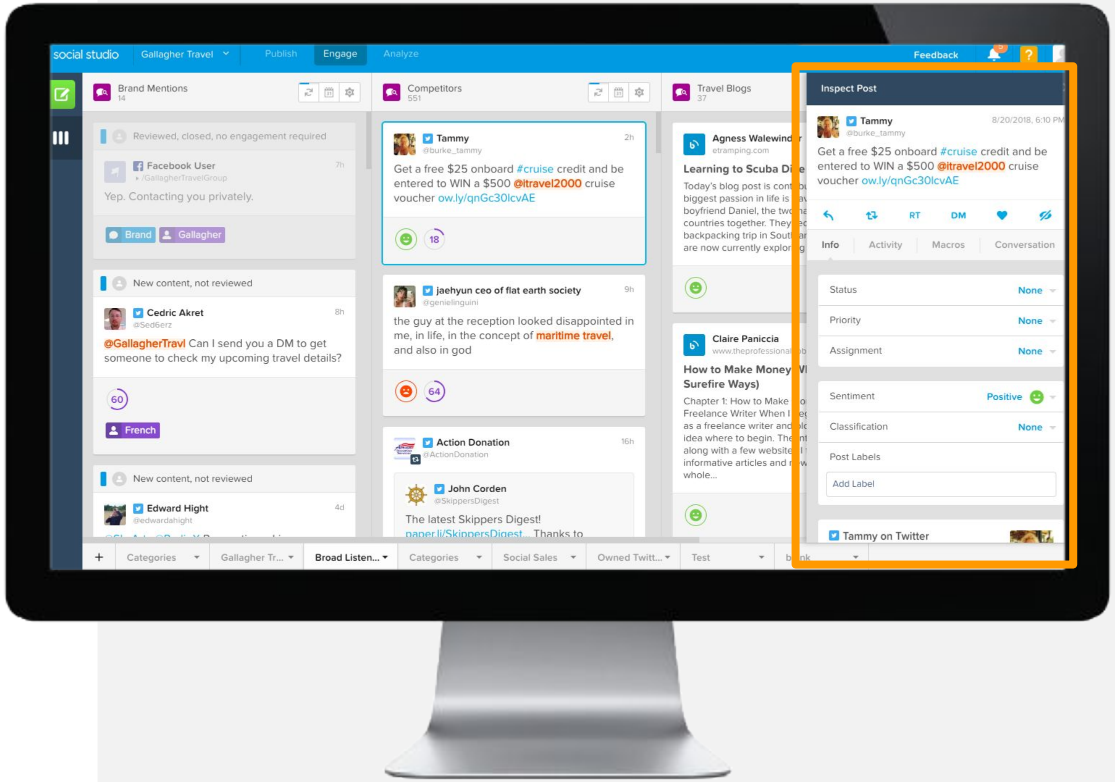
Engage

Post Inspector

When you click on a post, the Post Inspector will automatically appear. This tab has detailed information on that post; it is also the place where you can add actions and parameters to the post.

Taking a closer look, the info section contains:

- **Name of the author** of the post/tweet
- **Date/time stamp:** Click here if you would like to see original post/tweet
- **Actions:** Including reply, like, delete or hide
- **Status**: Such as closed, commented, waiting for best response and others
- **Priority:** Often used in cases of crisis management

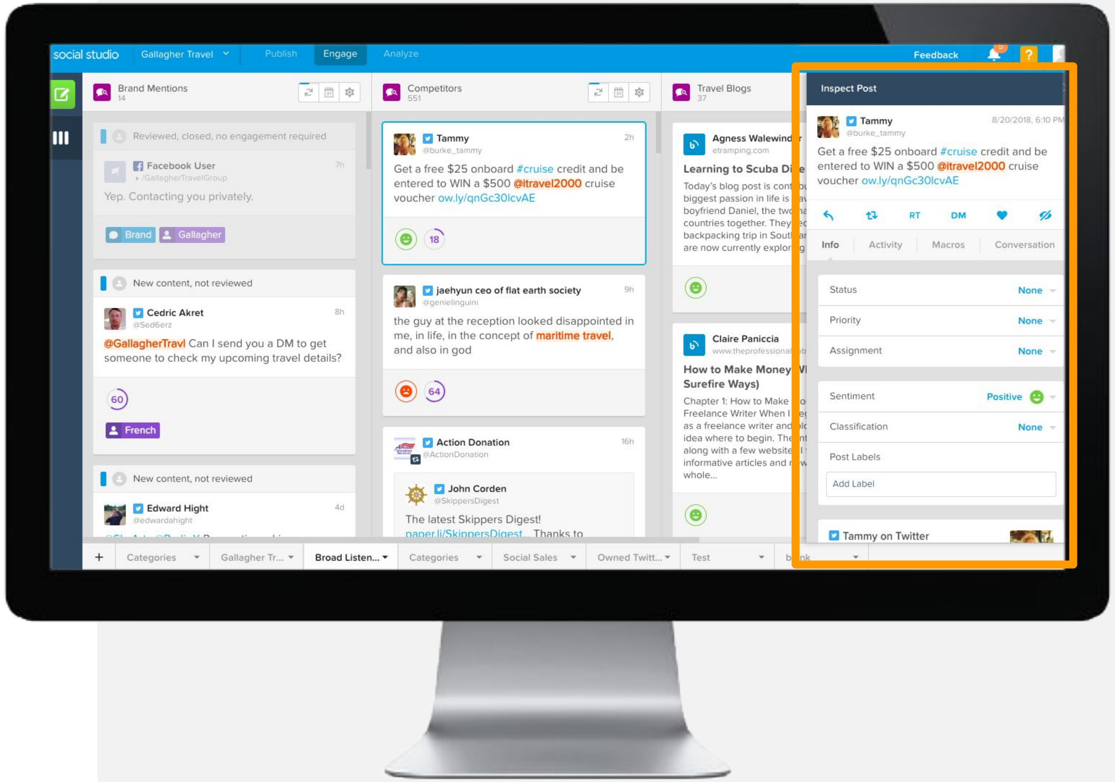


For more information visit: [Engage in Social Studio]

Engage

Post Inspector cont'd

- **Assignment**: It could be anyone added to the workspace
- **Sentiment:** Positive, negative or neutral
- **Post Labels:** A commonly used tag that attaches to the post. Not related to Publish labels.
- **Keyword**: Returns results where the content has a match to the keyword(s) entered.
- **Author Labels:** Adds context to who has posted/tweeted.



For more information visit: [Engage in Social Studio]

Social Studio Resources

[Release Notes](#)
[Events Calendar](#)
[Social Studio FAQs](#)
[Social Studio Glossary](#)

Engage Resources

1. Engage in Social Studio (eLearning)
2. Navigate Engage
3. Set up Tabs and manage Columns
4. Take action with incoming posts
5. Set up Macros for common post actions

Engage Best Practices:

- Combine all Social Accounts that you will be monitoring in a high-priority column
- Do not include posts written by your owned channels in the high-priority column (remove Posts /My Tweets)
- Utilize macros to drive efficiency
- Assign appropriate Status label once post has been addressed
- Create an “Awaiting Reply” column so posts that are awaiting a response from the customer are top of mind
- Create an “Assigned to me” column to ensure all items assigned to you will be addressed immediately

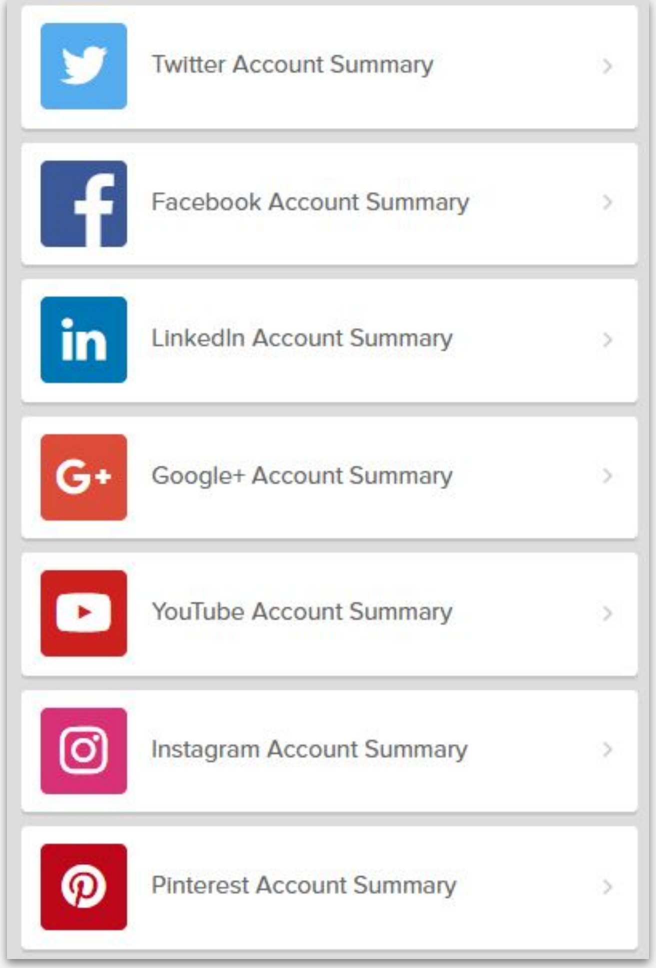
Analyze

Topic Profiles, Dashboards, Workbenches

Social Accounts: Your Brand Owned Channels

Social Accounts

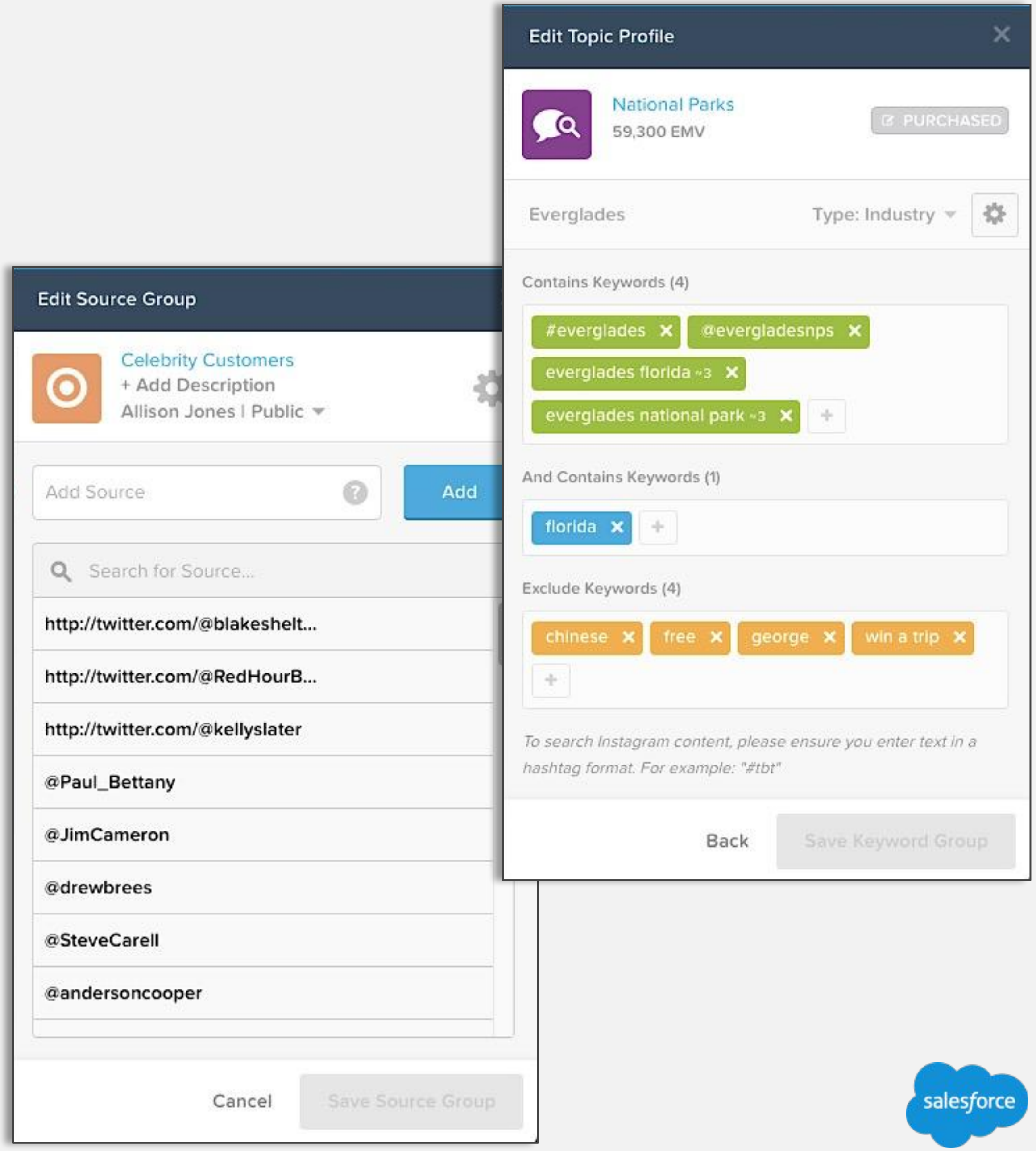
The number of social accounts allowed for a tenant is based primarily on the Social Studio edition purchased.



Topic Profile Components

Main features defined

1. **Topic Profiles: Social media searches that are comprised of keywords and filters.**
   - Analysis of social posts via Dashboards, Workbenches & Reports
2. **Keyword Groups: Social queries built underneath Topic Profile**
   - Ex: competitor v. brand social posts
3. **Source Groups: Track and manage important social listening sources.**
   - Monitor all content from social listening sources, including keyword-matched content.
   - Lets you exclude all content from specific sources.



Common Use Cases

Some of our most common use cases

Social Customer Service Monitor conversations about your brand that could invite action on your part.

Lead Generation Monitor complaints about your competitors or conversations about your brand that could prompt a sales representative to follow up

Crisis Management Monitor keywords and spikes in conversations that could indicate a crisis

Twitter Advertising lets you create a Topic Profile around a certain subject and turn that into a Twitter Tailored Audience.

Brand, Competitive, and Industry Monitoring Monitor conversations about your brand, competitors and industry

Content Strategy for Publishing Monitor industry conversations that might inform your content strategy

Research and Development Make brand decisions based on social conversations concerning a certain topic

Campaign and Event Monitoring Monitor keywords and conversations about your campaign or event.

Analyze Key Features

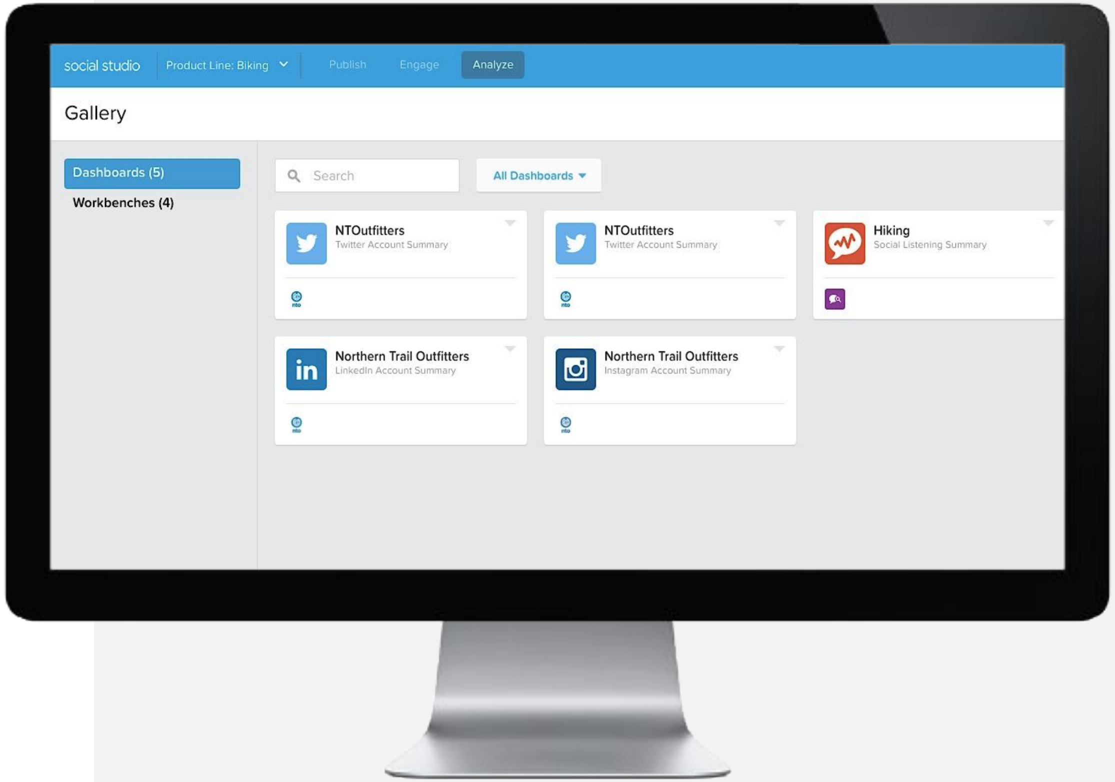
Dashboards and Workbenches

With dashboards you can:

- Monitor your brand's social accounts, competitors, and other social data.
- Quickly view the performance of posts, topics, and sentiment trends.
- See keywords that have emerged over days and months, or through a customized date range.

With workbenches you can:

- Understand your social data analytics in a deeper dive.
- Analyze your data by combining multiple segmentation types.



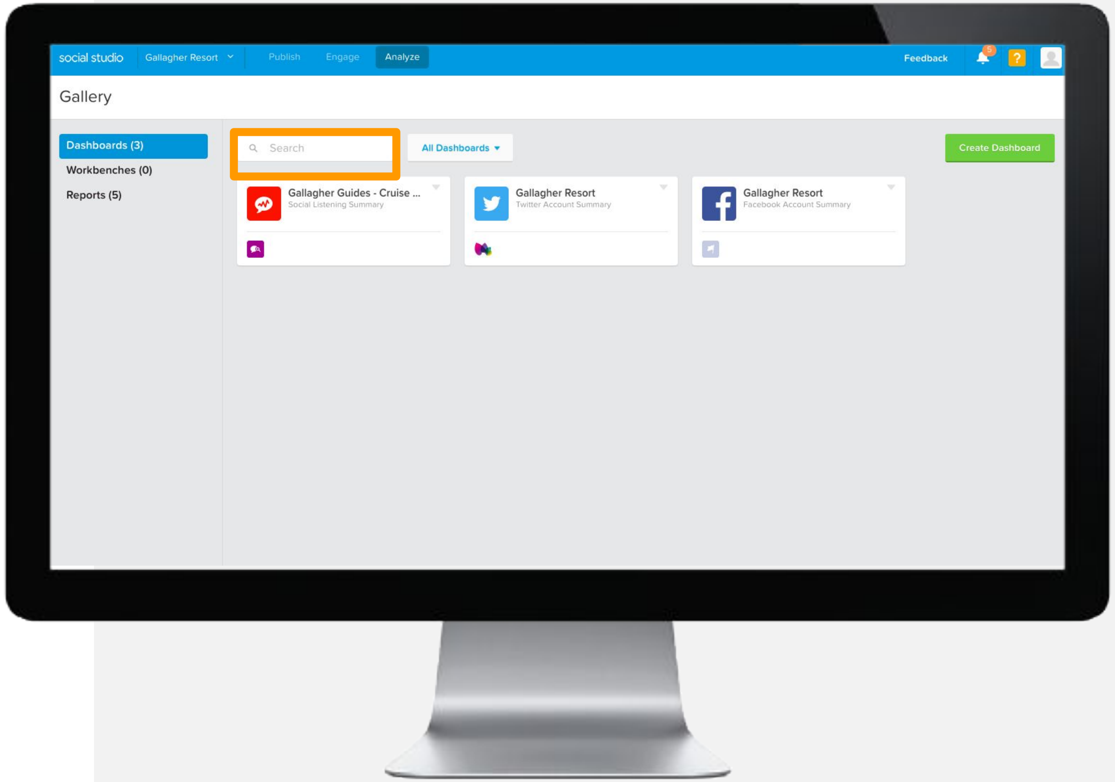
- [Learn more about dashboards]
- [Learn more about workbenches]

Analyze

Dashboards View

- Dashboards are used to monitor your brands, social accounts, competitors and other social data. At a glance, you can see the performance of posts, topics, and sentiment trends, plus emerging keywords over a set timeframe. There is also a feature that enables you to export the data as a PDF

- You can set your view to show all dashboards, just the dashboards created by you, hide dashboards, or share dashboards to the workspace



Note: you can create a social account summary with up to 50 accounts; social listening dashboard can only be configure with one topic profile

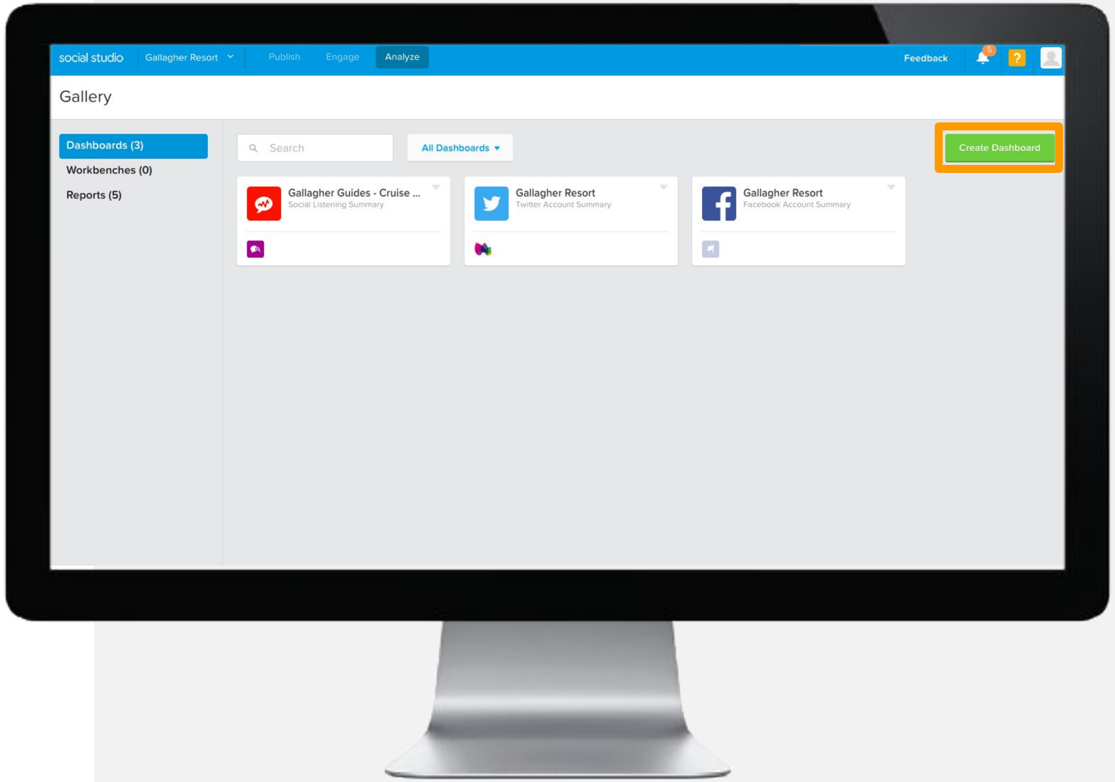
For more information visit: [Analyze in Social Studio]()

Analyze

Dashboards View cont'd

- To create a new dashboard, select create dashboard and click on the type of dashboard you wish to create
- Then select the accounts or topic profile you wish to monitor and press create dashboard
- Clicking the arrow on the corner of each dashboard will enable you to either delete, share, hide or duplicate that dashboard

Note: Social account summaries can only be create one channel at a time



For more information visit: [Analyze in Social Studio]

Analyze

Dashboards Filters

- The sections on this dashboard are called cards and vary depending on type of dashboard you are creating, social accounts or social listening
- All of the cards are downloadable in .cvs format except for the published post by engagement card

Note: Social account summaries can only be create one channel at a time

For more information visit: [Analyze in Social Studio]()

Analyze

Dashboards Filters cont’d

- Cards automatically display data for the past 7 days and compares the metrics to the seven days prior. You have the option to switch date ranges (at a dashboard level)
- You can export up to 500K posts/tweets from a feed card
- When exporting from a feed card, remember to check the workflow data option. This will show data related to tags, authors, assignments, and more
- You could inspect and download the content of most of the cards by selecting the arrow at the top of each one

For more information visit: [Analyze in Social Studio]()

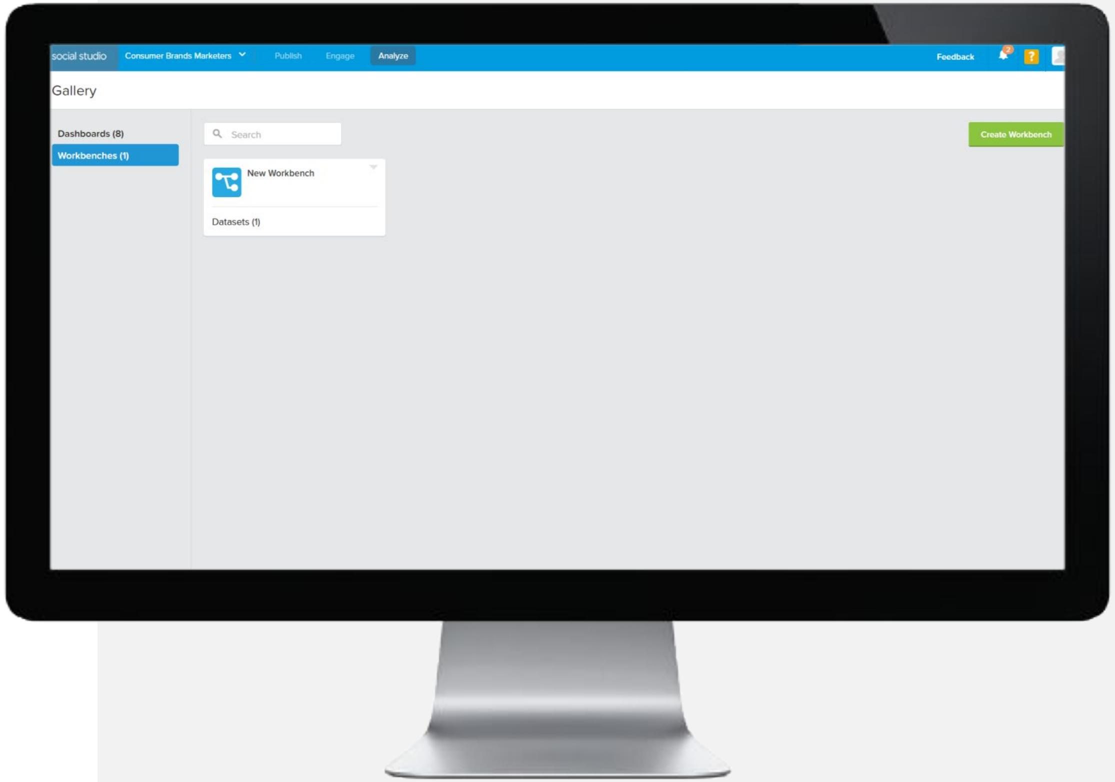
Analyze

Workbenches

Workbenches can be used to dive deeper into your social data. With workbenches you can analyze your data by combining multiple levels of segmentation such as:

- Keyword Groups
- Media Type
- Sentiment
- Language
- Region
- Post Labels
- Author Labels

Timeframes can be adjusted on a pre-set number of days or a custom range can be chosen.

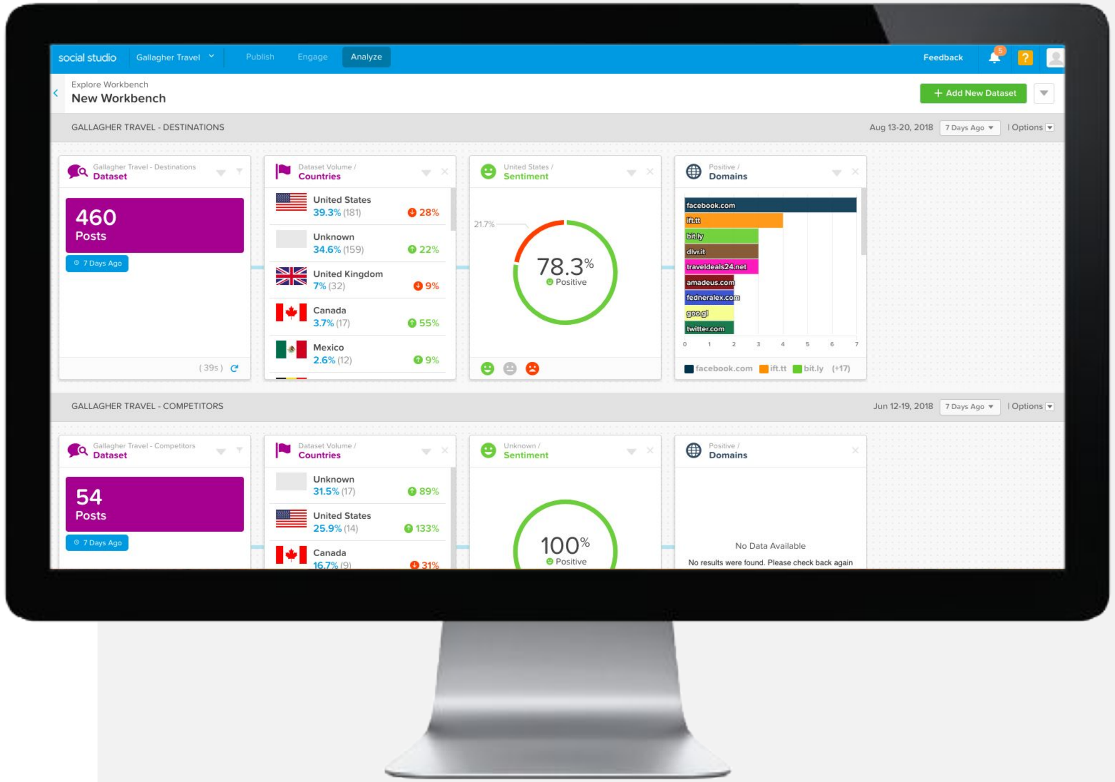


Note: you can create a social account summary with up to 50 accounts; social listening dashboard can only be configure with one topic profile

Analyze

Workbench Configuration

- Create a workbench by selecting “Create Workbench” and add the data you wish to analyze. Similar to dashboards, you can only add one topic profile at a time or multiple accounts from the same social channel
- Once the channel is selected, you have the option to change date range, as well as refresh, add/edit, rename or delete workbench
- Clicking on the primary card will prompt you to a filter tab

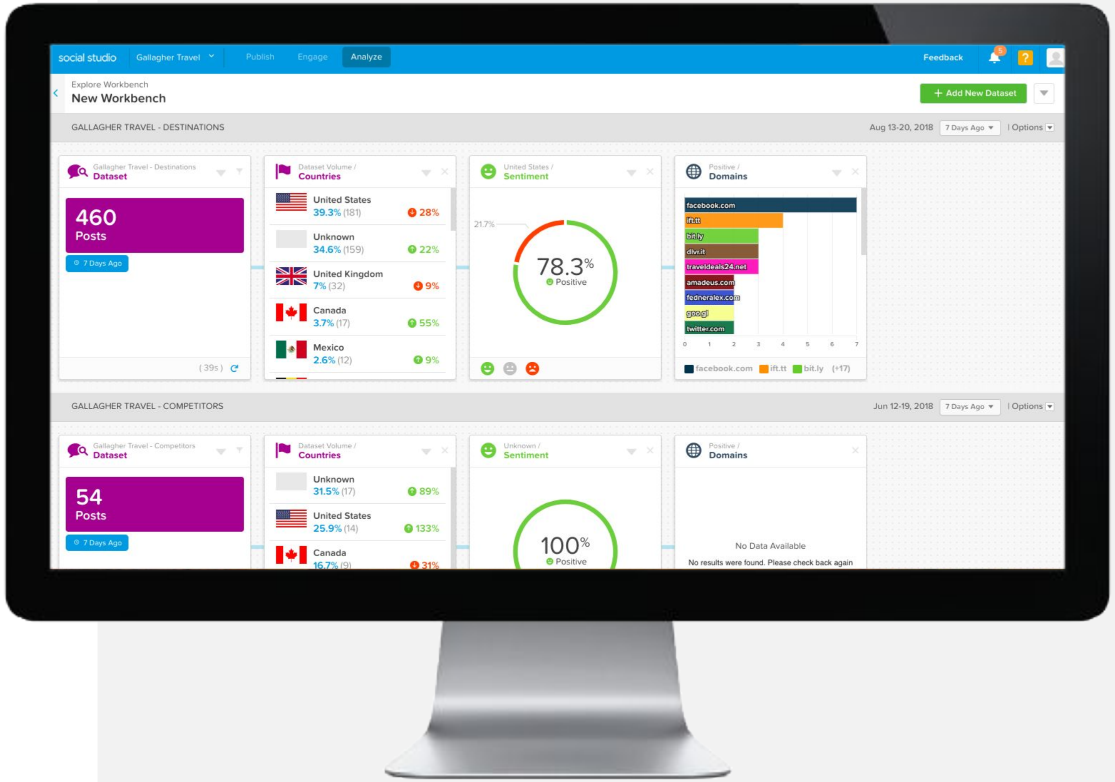


For more information visit: [Analyze in Social Studio]

Analyze

Workbench Configuration cont'd

- Select the type of card you wish to see and it will appear on the right hand side. A workbench can host an unlimited combination of cards
- Additionally, you could configure multiple datasets within one workbench

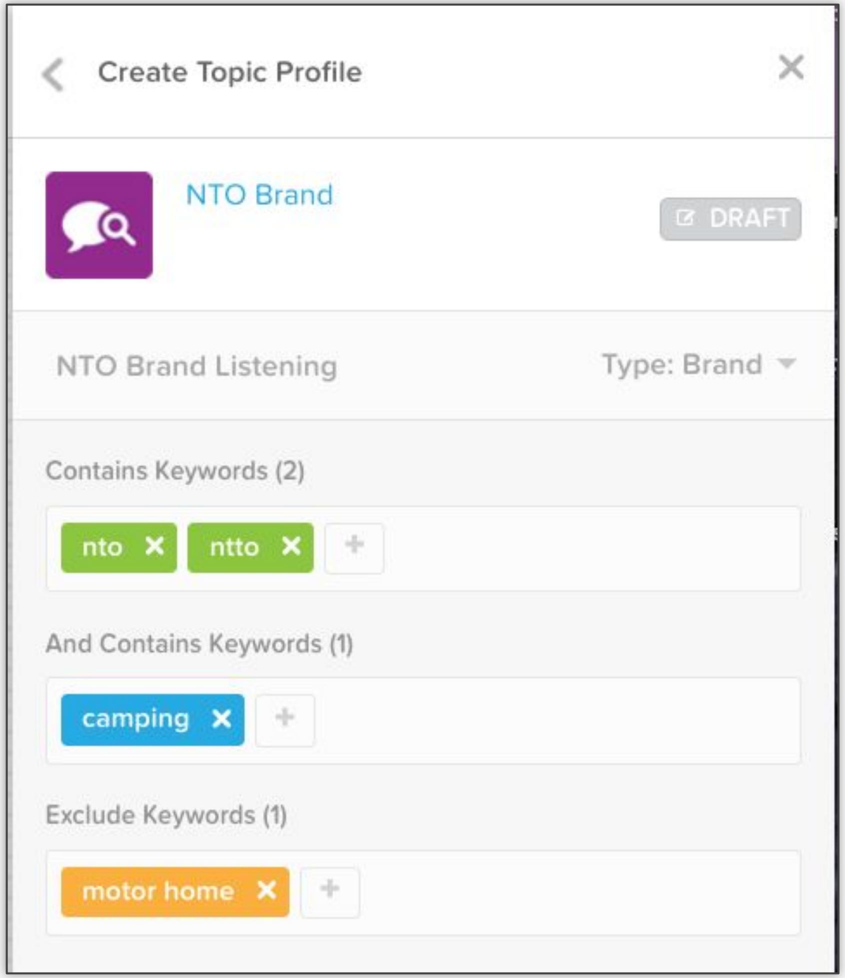


For more information visit: [Analyze in Social Studio]

How Does it Work?

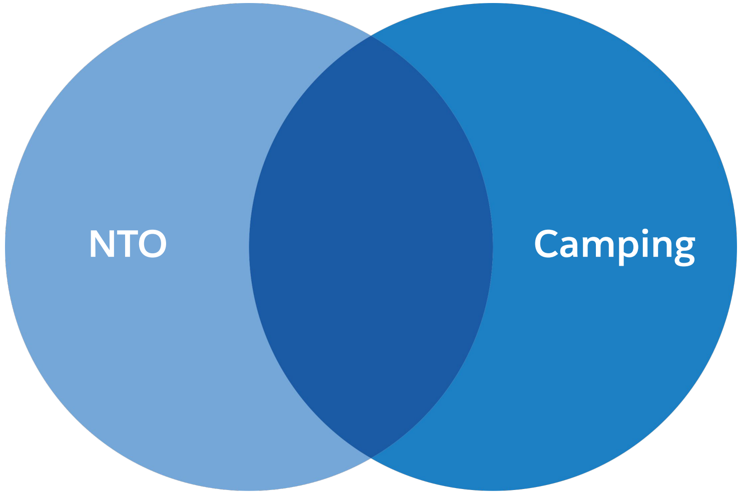
Boolean Logic Principles Applied:

1. Social Media is a vast computer database, and we search its contents according to the rules we use to search a computer database. Much of database searching is based on the principles of Boolean logic, which refers to the logical relationship between search terms
2. Boolean logic consists of four logical operators:
   a. OR
   b. AND
   c. NOT
   d. NEAR

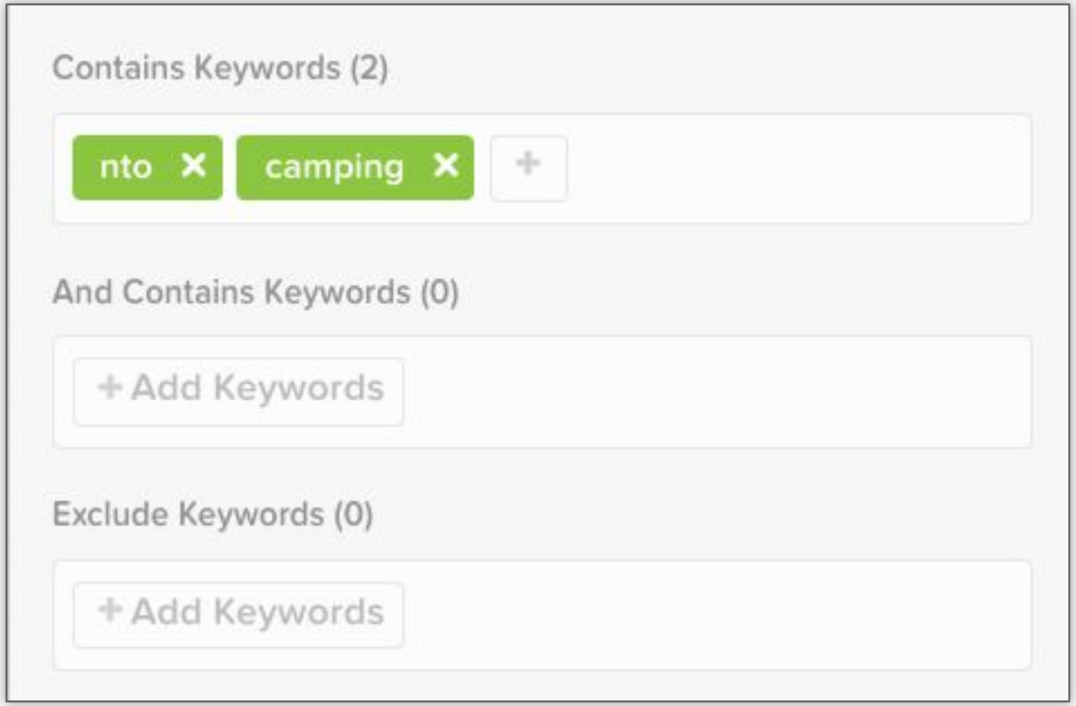


"OR" Logic

Boolean Logic Principles Applied:

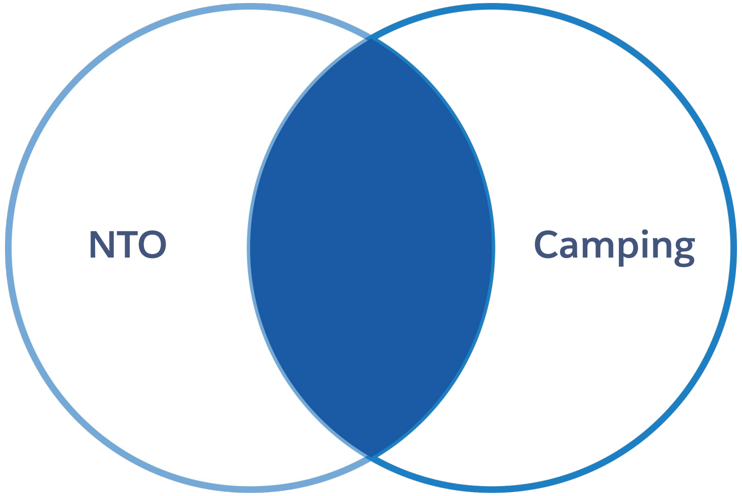


"NTO" OR "camping"

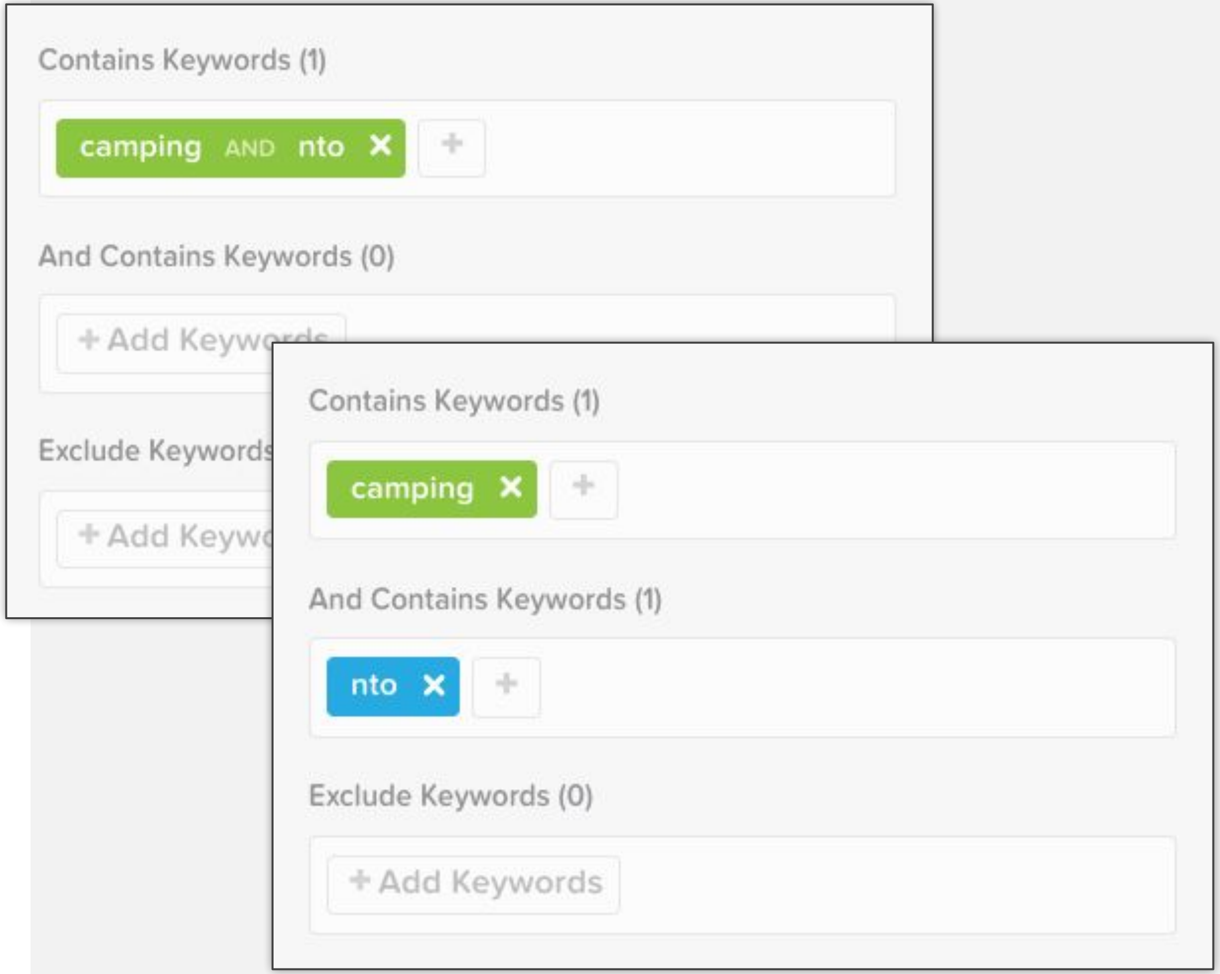


“AND” Logic

Boolean Logic Principles Applied:



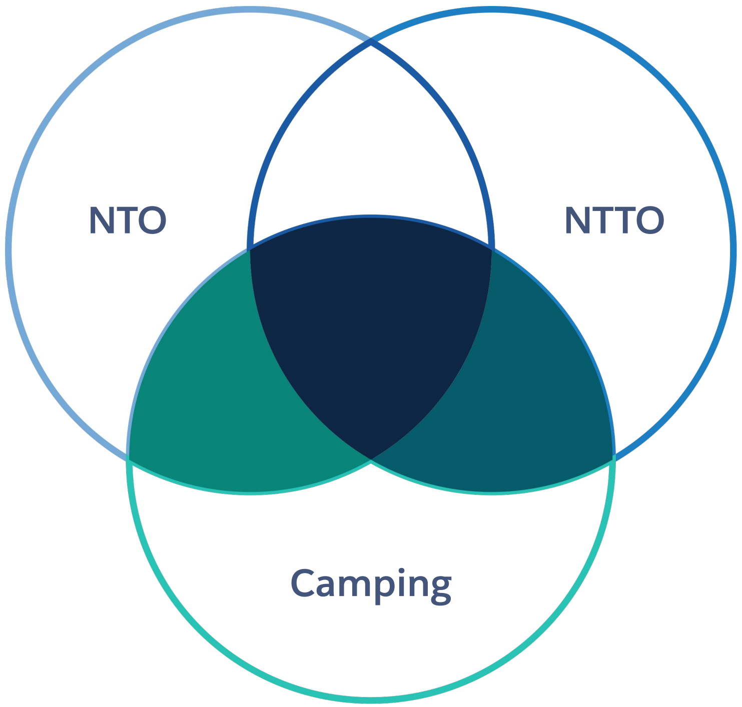
“NTO” AND “camping”



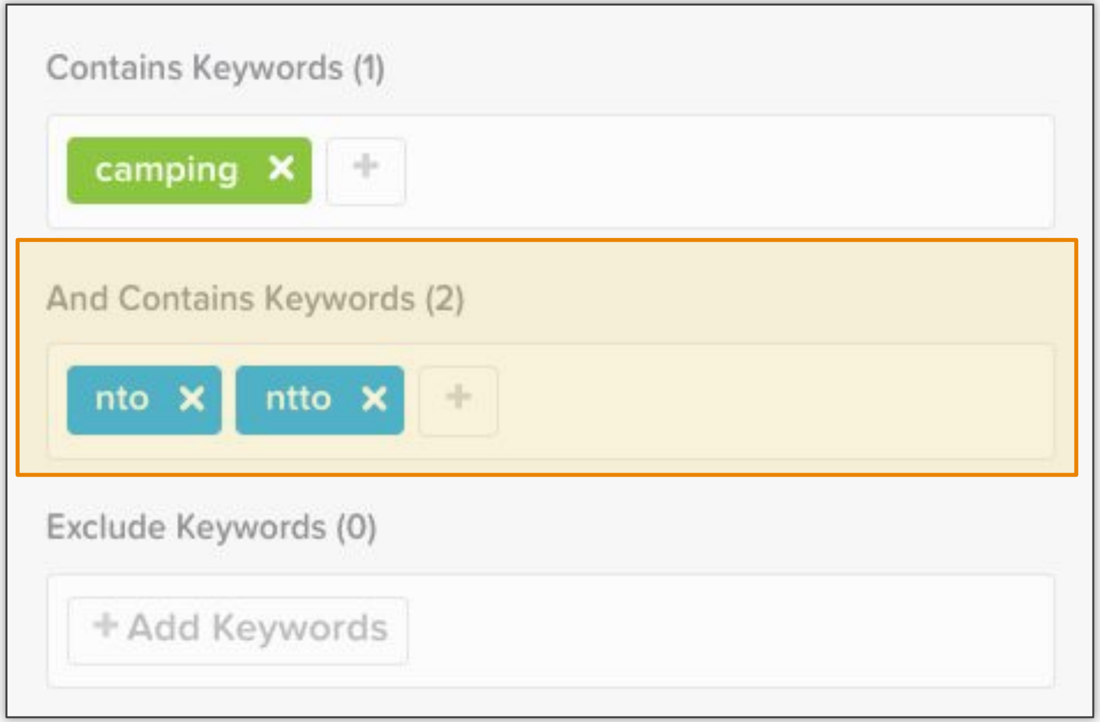
Using the “AND Contains” box

Boolean Logic Principles Applied:

Best Practice Alert!



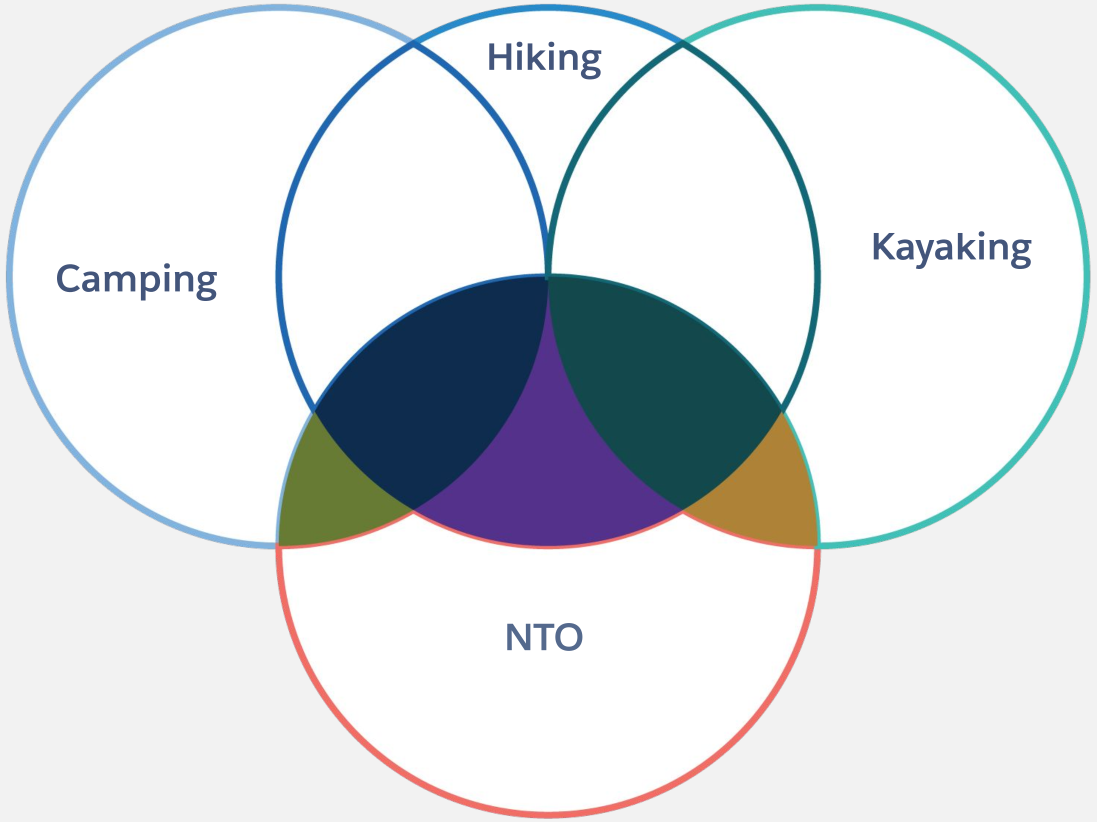
“NTO” OR “NTTO” AND “camping”



Using the “AND Contains” box cont’d

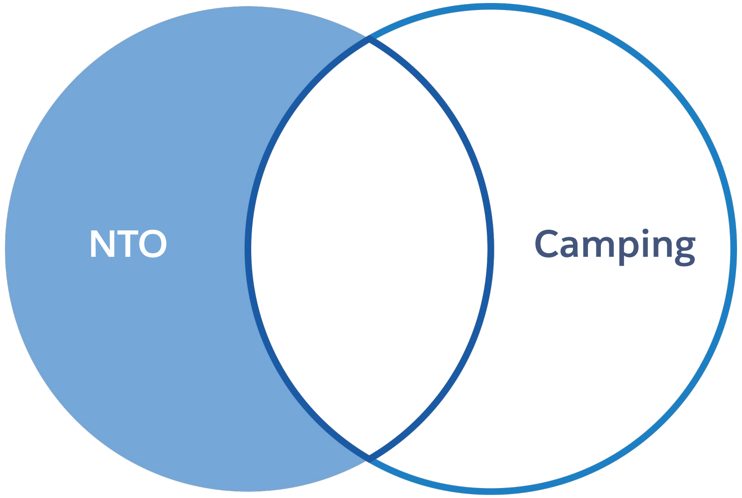
Topic Profile Structure

- Allows you to add a second list of terms so that any terms in your original keyword list must also be matched with one or more terms in the second box.
- Use several generic terms and match them against your brand, company name, or products.
- In the “AND CONTAINS” box, you could write all variations of your brand and product names.
- By doing this, you can enter “camping” or “hiking” or “kayaking” “AND” add “NTO” within the AND Contain Box, instead of adding “camping NTO” or “hiking NTO” or “kayaking NTO” in the top box only.
- Note that there is no proximity inside the AND Contains box.

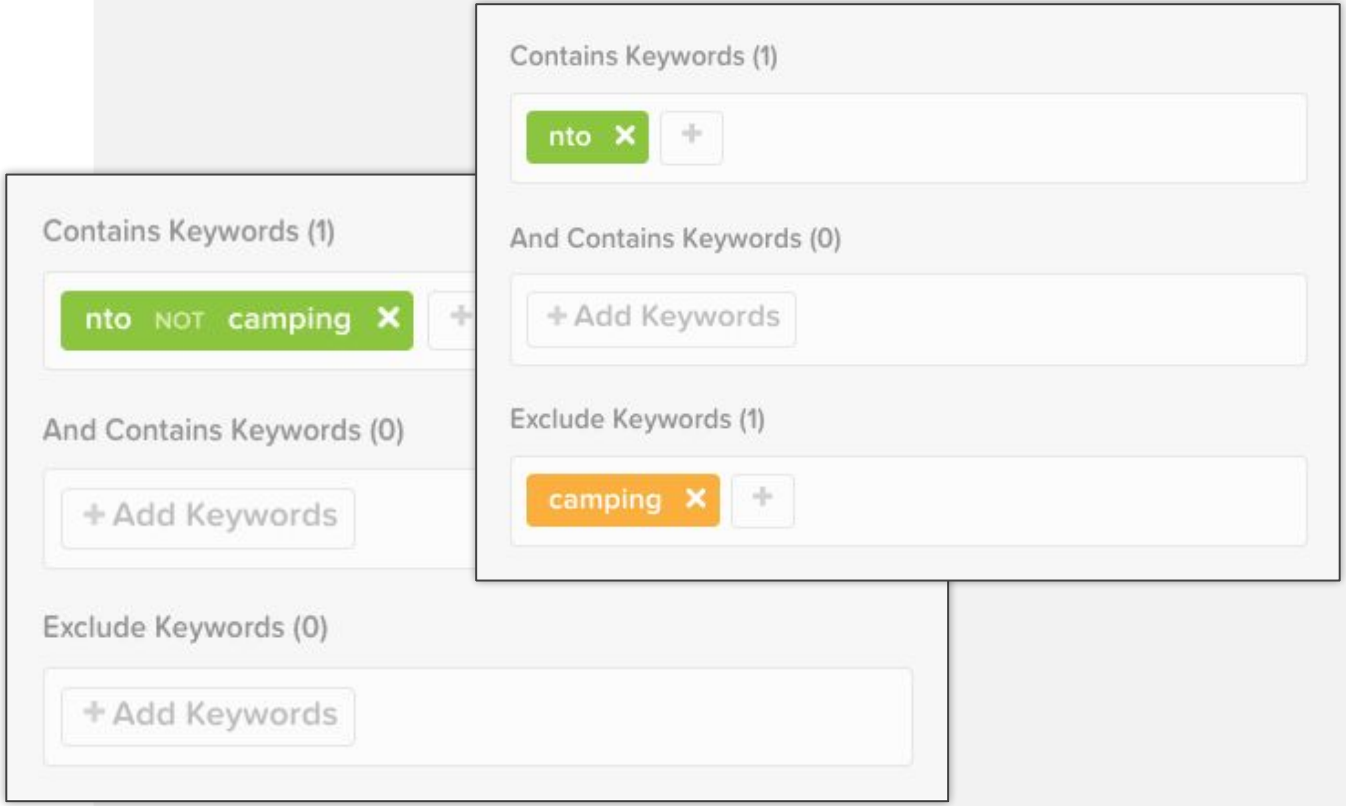


"NOT" or "EXCLUDE" logic

Boolean Logic Principles Applied:



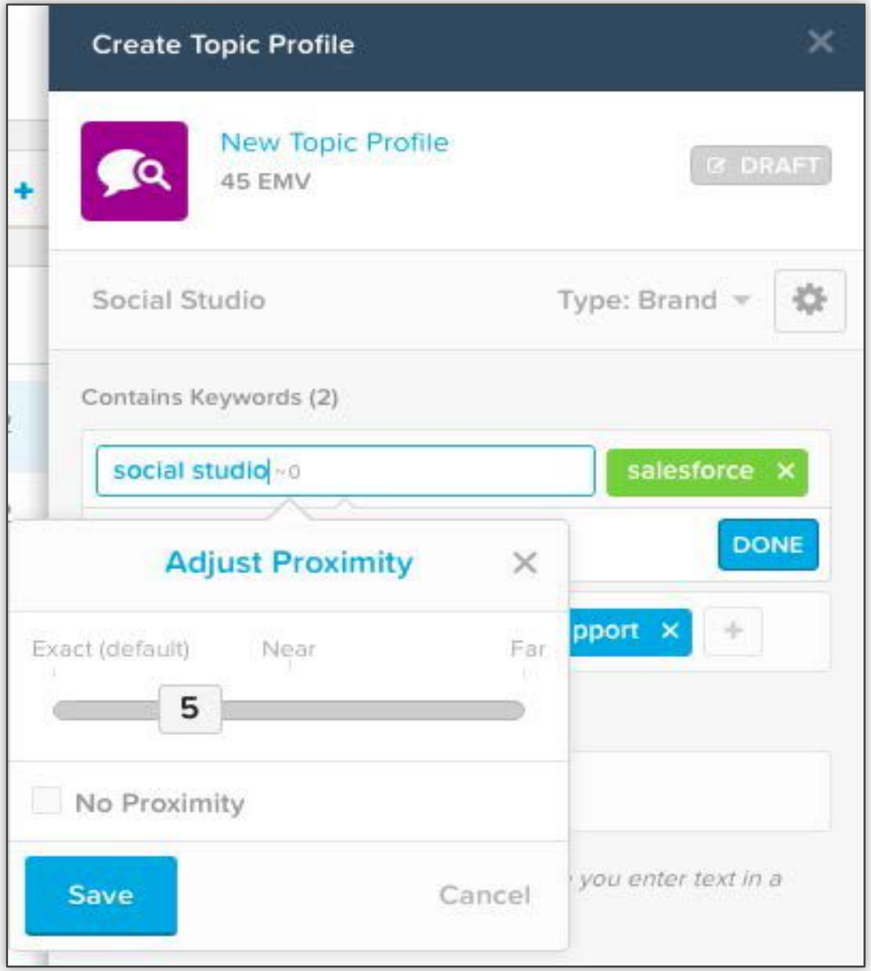
"NTO" NOT "camping"



“NEAR” Logic: Proximity

Relevance is Key

The Proximity Filter gives you the benefit of refining your search terms. Instead of retrieving results with keywords, which are widely separated in a post, and are likely unrelated, you can determine how closely together multiple words must occur to qualify as relevant content.



“NEAR” Logic: Proximity cont’d

Relevance is key

Examples using proximity:

- "want buy smartphone ~5“
- "looking for smartphone ~5"
- "can recommend smartphone ~5
- "I interested smartphone ~6"
- "I am looking buy smartphone ~7"
- "I want buy smartphone ~6"
- "want upgrade smartphone“~5

The results from these settings would look like this:

“Hi guys, I am looking to buy a new smartphone and I am really confused in between the iPhone 6s and Samsung Galaxy S6 Edge. Please help.“

"I am looking for a new smartphone around 300AUD, I keep my eyes on LG G FLEX 2 which has very good value for the price I think...”

Analyze

Optimizing Topic Profiles

Refining your Data

- Once you've added keywords to your topic profile, you should look through a "feed" card to validate your results to ensure relevancy and to minimize noise (off-topic posts). You can immediately see how people are talking about your brand and make modifications as needed.

Remove/Modify Generic Keywords

- You may get off-topic posts if you are using abbreviations/acronyms for keywords that have duplicate meanings. For instance, adding "IT" as an abbreviation for "Information Technology" will pull in a significant amount of noise. We can make this term more specific to our monitoring purposes by editing the term to "Healthcare IT"

Here are some basic tips to remember when configuring a Topic Profile

CONTAINS	AND CONTAINS	DOES NOT CONTAIN
Add terms that qualify and/or are associated to those in the CONTAIN box	Add Brand, Product, Campaign name	Add terms causing noise within the filtered posts
Proximity feature enabled	Does not support proximity	Add unwanted content
Able to add one or more words as a keyword	Preferably, limit this to one word	Terms in this box will be applied to keyword group only, not the Topic Profile
		There is a limit of 60 words that can be added to this box

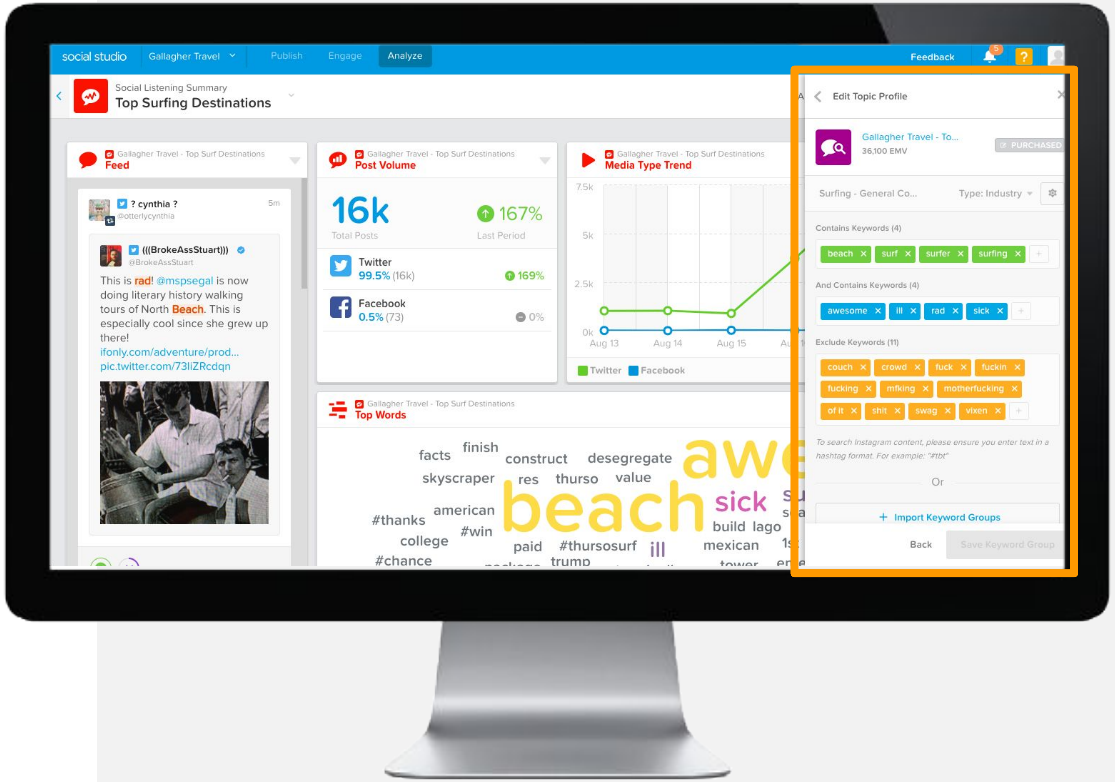
For more information visit: Topic Profiles in Social Studio

Analyze

Optimizing Topic Profiles

Tips to reduce widget load times include:

- Long strings of keywords (including “AND” terms and “DOES NOT CONTAIN” terms)
- More than 60 keywords in a topic profile
- More than 30 ‘DOES NOT CONTAIN’ keywords in a topic profile
- Several short, common keywords/exclusion words (“and” or “the” or “it” etc)

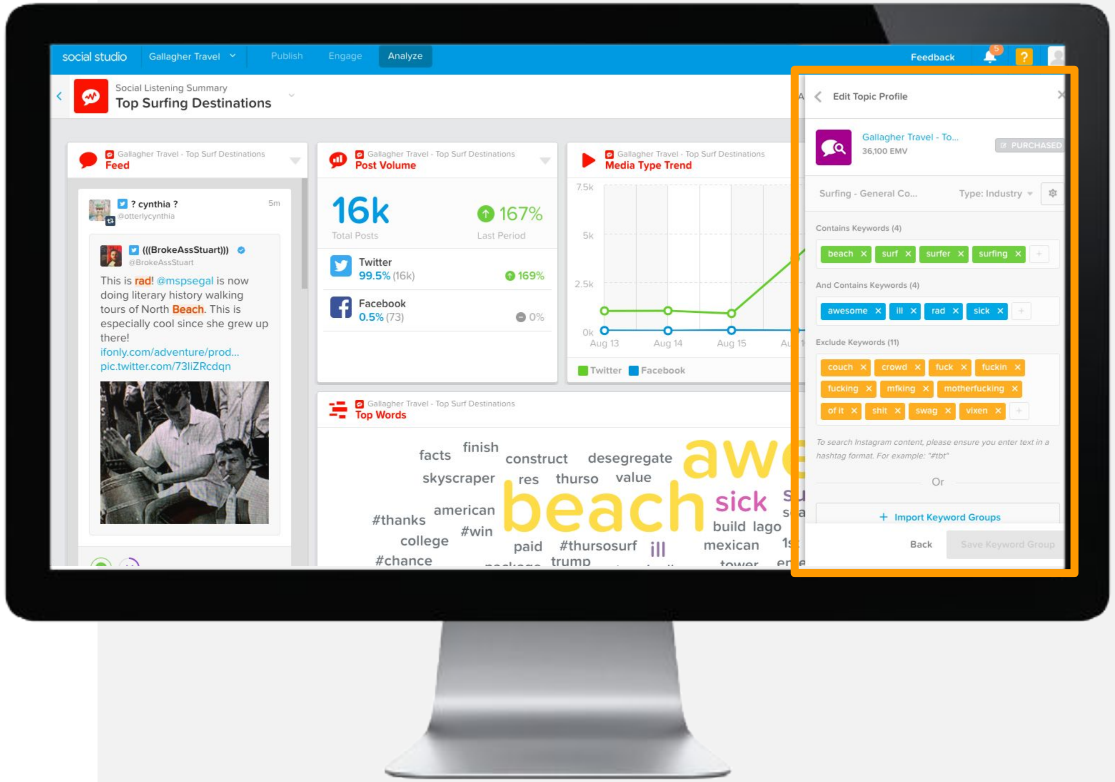


For more information visit: [Topic Profiles in Social Studio]()

Analyze

Optimizing Topic Profiles cont'd

- Use source groups as needed. These will be available at a tenant (organizational) level – make sure there are set to "public" so everyone in the organization can use them
- Do you need all regions, languages, and media types? It is a good idea to always consider where do you want these conversations to come from, including what media types (i.e. will buy/sell ever be needed)



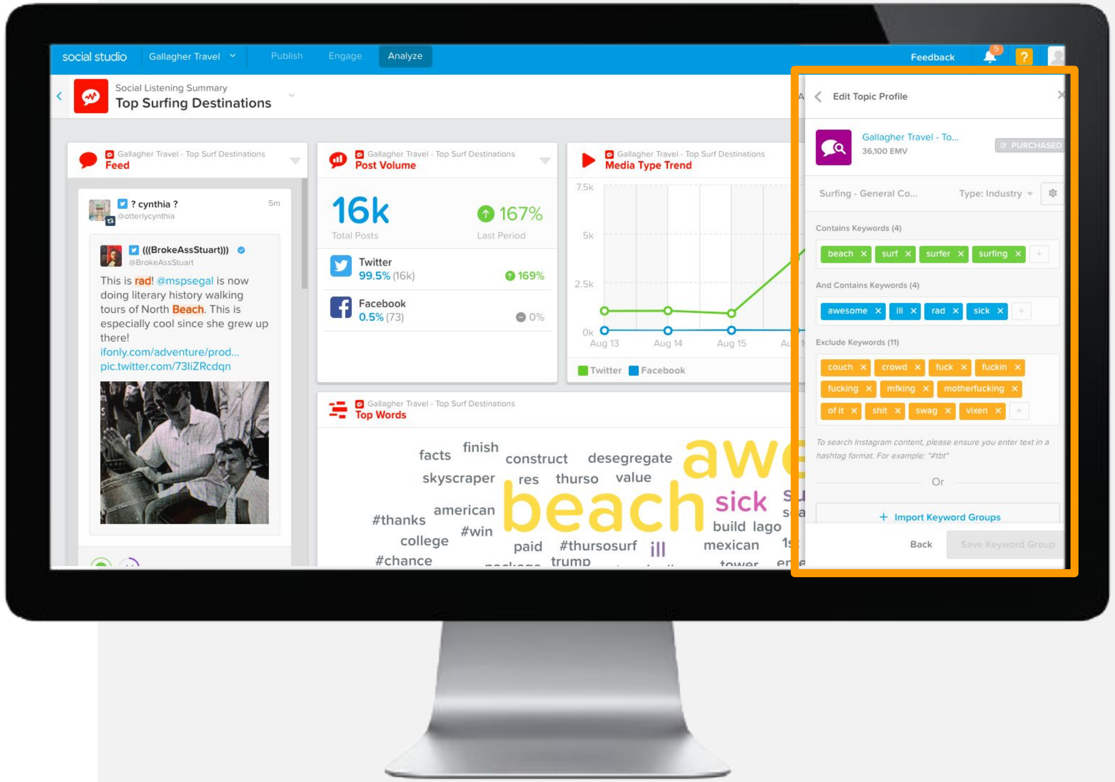
For more information visit: [Topic Profiles in Social Studio]()

Analyze

Topic Profile Audits

- Audit the number of Topic Profiles (TP) and its use case often to avoid duplicate of data and increase of EMV of the tenant

- Topic Profiles can be shared with other workspaces, enabling other users to access this data. Note: not all users will be able to edit the TP, this will be based on the user’s roles and permissions



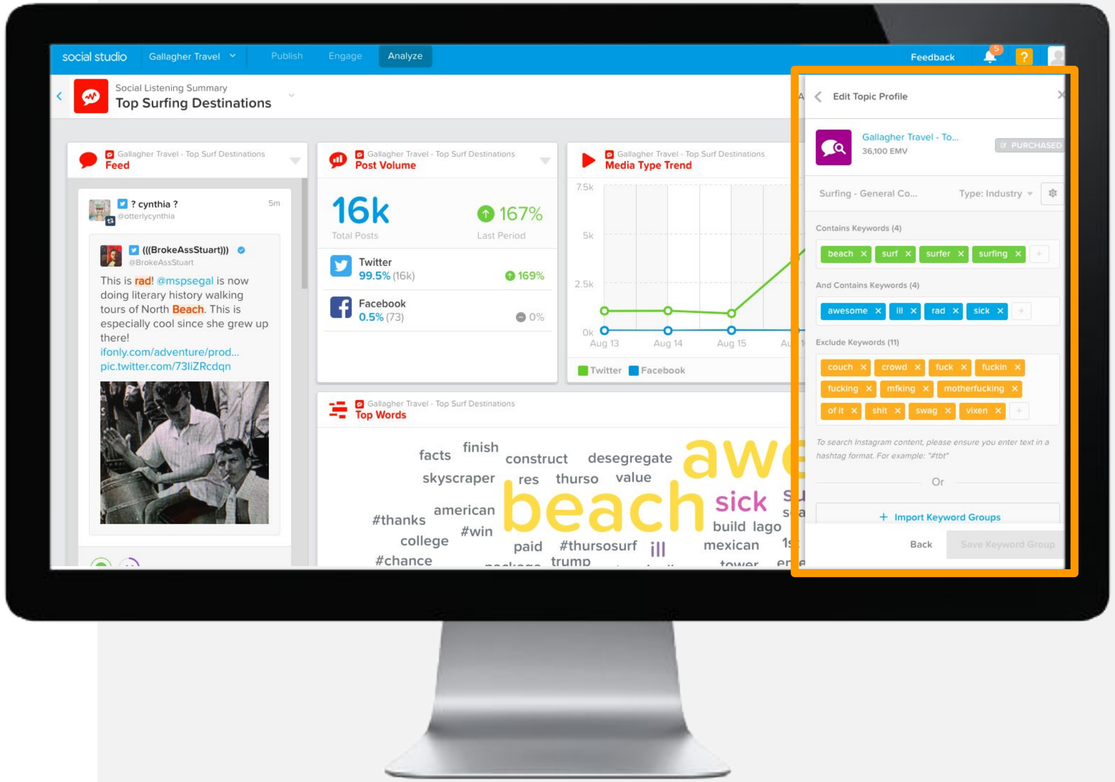
For more information visit: [Topic Profiles in Social Studio]()

Analyze

Topic Profile Audits cont’d

- If a TP was created for a one-time only listening purpose, consider ways to use a TP already created and filter the query at a dashboard/workbench level OR create a new TP and evaluate once it is no longer needed.

- If a TP has been created that has high EMV and will only be useful twice a year, for example; consider deactivating it soon after it is no longer needed. Before doing so, record the TP name and TP ID. You can contact the Support team and ask for the TP to be reactivated



For more information visit: [Topic Profiles in Social Studio]

Topic Profile Best Practices / Cleaning Up Noise

- Whiteboard goals and keywords
- Be specific:
  - "Camping" (too broad)
  - "NTO" AND "camping"/ "NTO camping" proximity 7
- Utilize proximity filter, media types, language and location to increase accuracy
- Consider removing irrelevant media types, such as buy/sell and aggregator
- Ensure *share of voice* keywords mirror each other:
  - Example: "NTO" AND "camping" v. "REI"
  - Example: : "NTO" AND "camping" v. "REI" AND "camping"
- Always check for noise:
  - Dashboard- Top Words, Volume Trends, Media Types
  - Workbench- Sources, Hashtags, Domains and Usernames
- Use "Exclude Keyword" and Source Groups to reduce noise/increase accuracy
- Keep EMV under 50k/profile (review before saving)
- Don't let perfection be the enemy of progress - you will likely always have some noise to deal with.
- Schedule monthly maintenance

Social Studio Resources

Release Notes
Events Calendar
Social Studio FAQs
Social Studio Glossary

Analyze Resources

1. Listen and Analyze in Social Studio(eLearning)
2. Explore Analyze Dashboards and Workbenches
3. Create and Manage Dashboards
4. Explore Dashboard types and Cards
5. Create and manage Workbenches and Datasets
6. Explore and Manage Topic Profiles

Analyze Best Practices:

- Always check EMV
- Consider creating a generic brand profile and adding it to all workspaces to avoid duplicate profiles (adding to EMV)
- Use Top Words, Volume Trends and export Feed to find noise
- Look at spikes in Volume Trend card to look for potential PR issues, a new competitive product, conversations around a product launch, etc.

Learn More

Accelerate Your Path to Success

Do It Myself

Trail: Social Media Marketing & Engagement

CoS: Optimize Your Social Listening with Social Studio

CoS: Enhance your Content Strategy with Social Studio

Landing Pages: Getting Started Social Studio, Optimize Social Listening

See all Trails

See all Success Resources

Show Me How

How to: Social Studio: Set up Social Listening

How to: Social Studio: Set up Social Customer Service

How to: Social Studio: Set up Social Studio Automate

How to: Social Studio: Set up Command Center

Review: Social Studio: Improve Feature Adoption

See Upcoming Circles of Success

See our Complete Portfolio of Salesforce Accelerators

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A designated single Cloud expert who will be the Salesforce lead on your deployment, providing expertise and oversight for your architectural needs.

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Accelerate your Lightning transition with expert guidance on Lightning readiness, feature usage to maximize ROI, and a tailored transition plan

See all of our Salesforce Services

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Accelerators
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Trailhead
Success Communities
Help Portal

Advisory Services

Architects
Customer-Centric Design
Strategic Services
Transformation Services

Show Me How

Do It Myself

Do It With Me

Blaze Your Path to Success, Faster

With Success Plans to Take You Further

	Standard	Premier
Guided Journeys	✓	✓
Success Community	✓	✓
Trailhead	✓	✓
Accelerators		✓
Developer Support		✓
Success Management		✓
Circles of Success		✓
Interactive Webinars		✓
Admin Assist		optional upgrade
Support	12/5 Online 2-Day Response	24/7 Phone & Online 1-Hour Critical Response

Learn more about Premier Success

salesforce

Next Steps

Let's schedule dates and get started

1. Join the [Marketing Cloud Trailblazer Community]

2. Take the [Social Media Marketing & Engagement] Trailhead Module

3. **Premier Customers:** Request your 1:1 with a Salesforce Success Specialist and plan your next Accelerator (1:1 follow-up invitations will be sent after you complete the survey).

4. **Check your email** tomorrow for links to this session's recording and slides, and complete the survey to share your feedback on today's webinar.

5. Not a Premier Customer but Interested in Learning More? **Reach out to your Salesforce Account Team** for more details.

Question?

Send us your Feedback!

After this, you'll receive an email with a survey asking for your feedback and offering opportunity to **sign up for a 1:1 follow up session.**

Your feedback is incredibly valuable to us, so please feel free to add any comments you have about this Accelerator and how it could be improved.

Would you recommend this webinar to others?

- Definitely
- Probably
- Neutral
- Probably Not
- Definitely Not

Thank you

Overview

This Accelerator will walk you through the ins and outs of Social Studio and outline basic best practices for each component of the platform.

First Session- Group Environment (2 Hours):

Agenda:

- *Webinar Overview/Scope (15 minutes)*
- *Component Review:*

  Admin- 45 minutes

  Publish - 45 minutes

  Resources - (15 minutes)

Second Session- Group Environment (2 Hours):

Agenda:

- *Component Review:*

  Analyze - 1 hour

  Engage - 45 minutes

  Resources - (15 minutes)

Third Session: 1:1 Q&A for your organization – Register here

- Wrap-Up- Checkpoint and Discussion (1 Hour)

•Review progress/ accomplishments since the live accelerator

•Answer questions related to accelerator material

**** 1:1 available dates: 5/2/18- 6/29/18***