



A Harland Clarke
Speaker Series

Social Media + Content Strategy: A Dynamic Duo

The content for this presentation was created by Holly Fearing. The views and opinions expressed herein are those of the author, Holly Fearing, and do not necessarily reflect those of Harland Clarke.

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Moderator

Christine Ahlgren

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“The most successful social media programs for credit unions utilize multiple channels including traditional media, utilize the interactive nature of social media to inspire multidirectional conversations, and align with overall marketing strategy objectives.”



Sybils : Multiple personalities (25%)

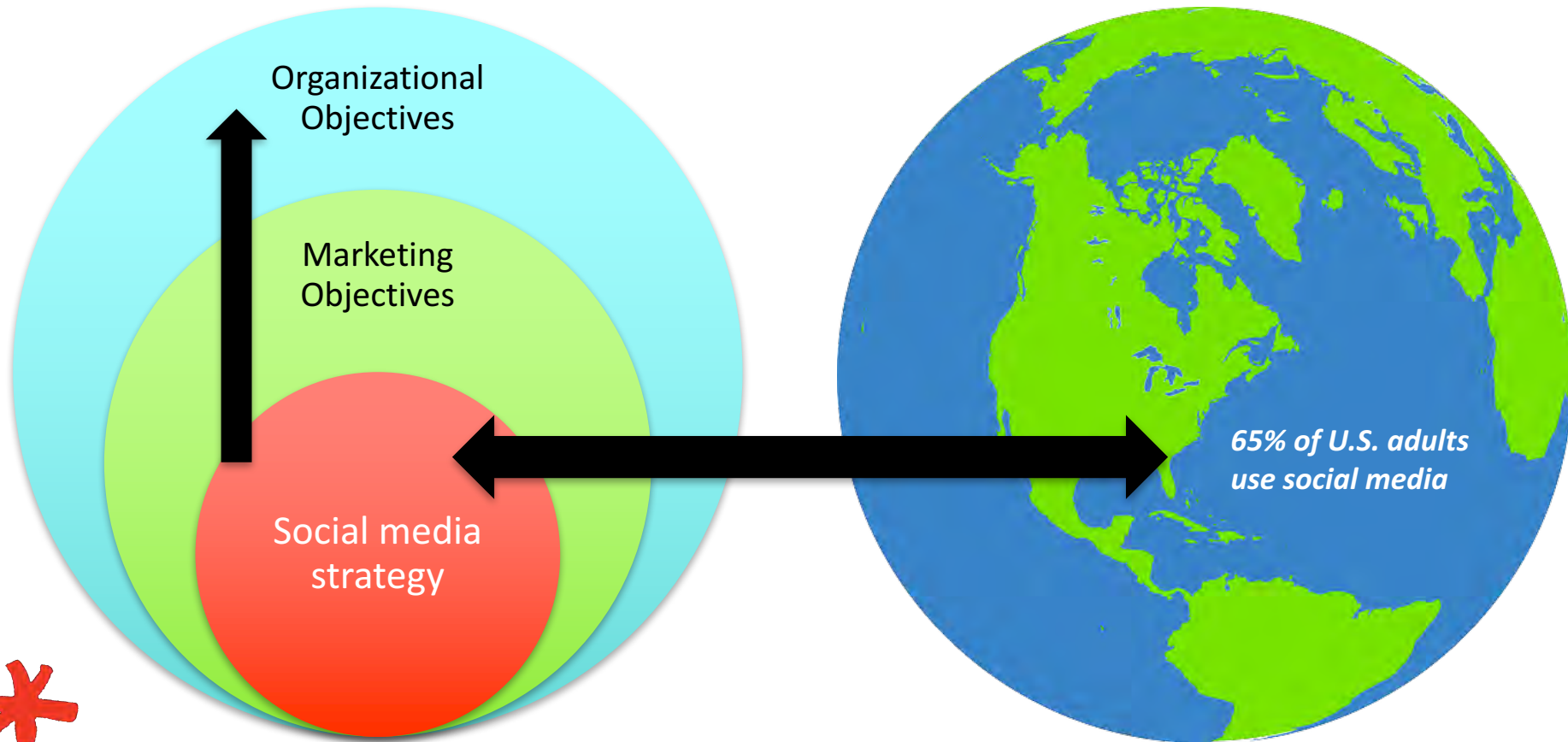
Integrators: Identical across all (27%)

Monogamous: Stick to one (40%)

MacGyver: Use any tool like a pro (6%)

*That's the best approach, hardest to do,
and impossible without a strategy*

WHY DOES STRATEGY MATTER?



Its all connected:

An effective social media presence is essential for potential new members to find their way to your organization.

STRATEGIZE BOLD, EXECUTE SMART



Assessment: *Know **what** you're doing, **what** others are doing, decide what you can/want to use social media for and **what** you hope to gain from it.*



Strategy: *This is your “**how to**” guide to ensure you're tracking to right outcomes, **how** you'll know if you're successful and provide framework for decision-making.*



Support & Refresh: *This keeps your strategy always **relevant** in an environment that is constantly **changing**. Take advantage of new **opportunities and technologies** to better achieve your goals.*

SOCIAL MEDIA'S MANY ROLES:

- **Relationship tool**
- **Customer service channel**
- **Digital brand presence and personality/voice**
- **Marketing**
- **Recruitment**
- **Advocacy**

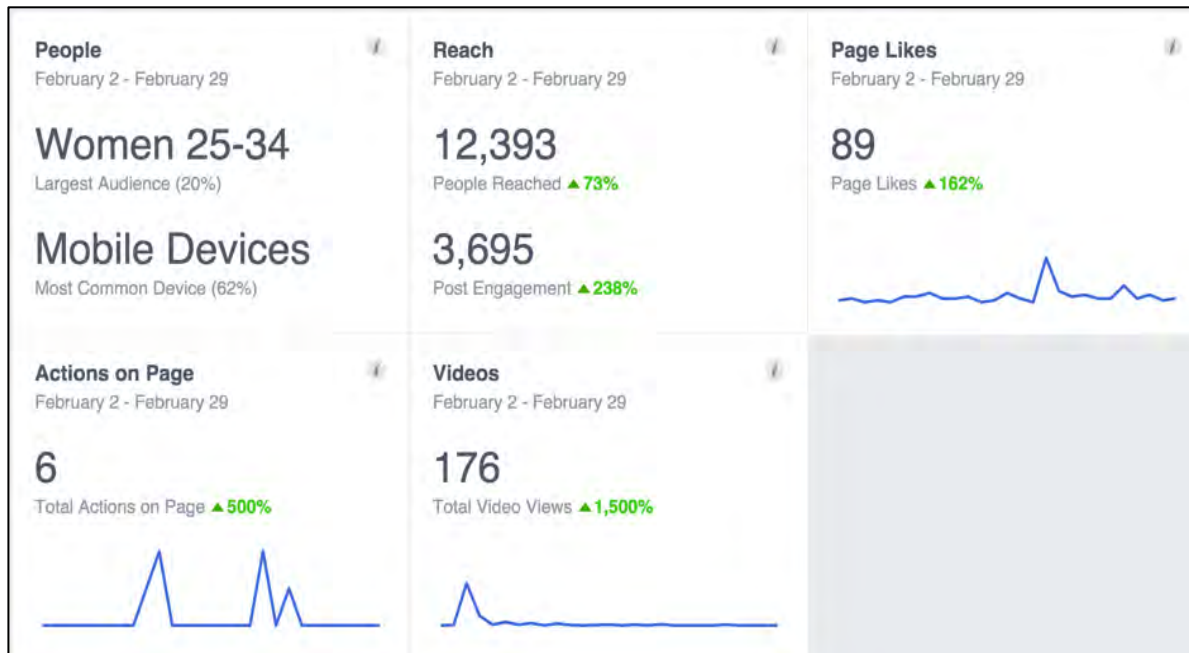
A SOCIAL MEDIA STRATEGY...

- Tells your “who you are” **story**
- Shows what you have **to offer** your audience
- Asks what you want **in return** from your audience



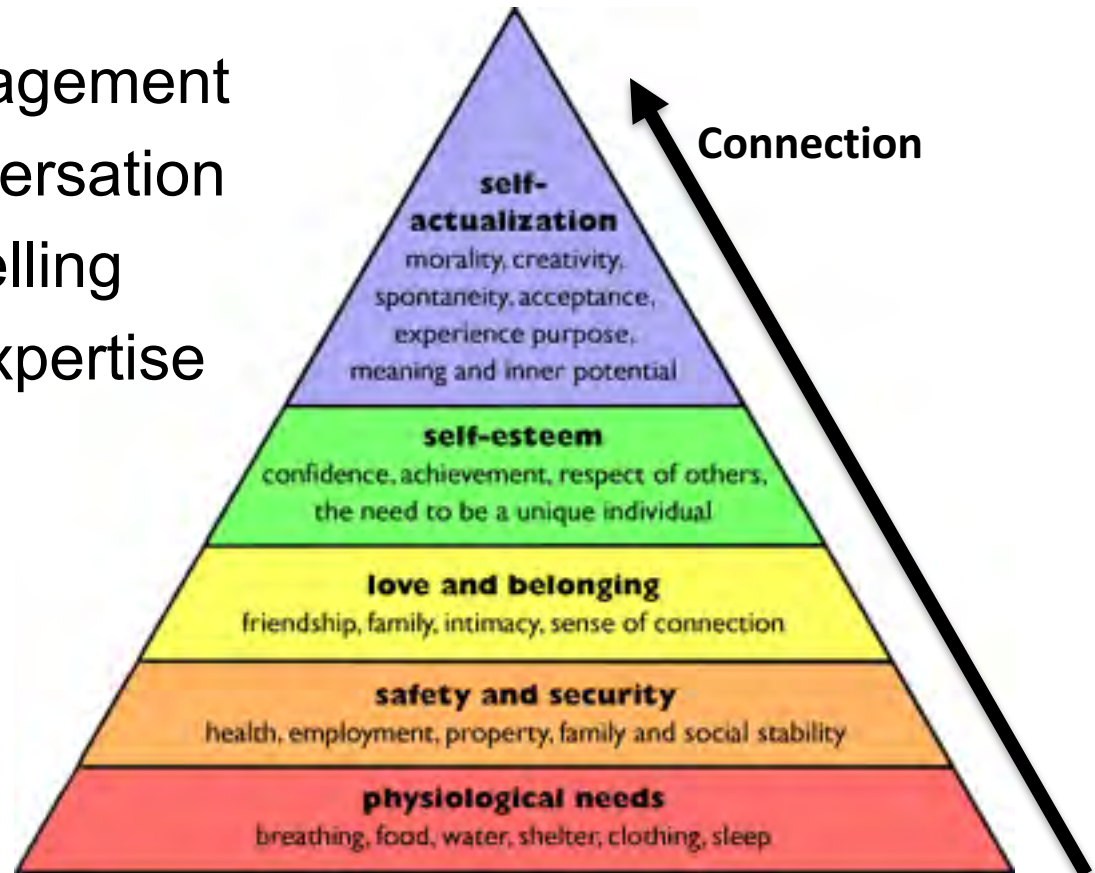
AUDIENCE: DEFINE AND GROW

- This takes time but if you haven't done an audience audit or made a plan for growth in a while, it is worth the effort.



WINNING OVER AN AUDIENCE

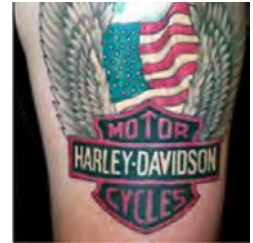
- **Listen:** Passive engagement
- **Engage:** 2-way conversation
- **Be relatable:** Storytelling
- **Be valuable:** Your expertise



WINNING OVER AN AUDIENCE

Customers cannot be truly loyal to you unless your brand has earned the right to be part of how **they view themselves**. If you have built that customer connection, loyalty is yours.

-- Mark Hans Richer, CMO, Harley Davidson



Do you feel like your brand has built an environment of customer connection?

CHANNELS, EXECUTION & TARGETING

- **Decide your ideal cadence:** Too much or too little posting can be a bad thing. Look at your Facebook insights and Twitter Analytics to see historic posting frequency.
- **Speaking of ideally...** Post 1 time per day on Facebook (plus weekends!), 5-8 times per day on Twitter, 3-5 times per week on LinkedIn and 3-5 times per week on Instagram.
- **Choose the right balance of posts:** Sharing others' content, original material, links, pictures, videos.



WHAT CONTENT WORKS?

ASK: DOES IT...

- Inspire?
- Entertain?
- Educate?


STORYTELLING BEST PRACTICES

- ✓ **Know your Audience** – *be relatable, look for connections*
- ✓ **Be genuine** – *use your voice, stories, humor, be present*
- ✓ **Be valuable** – *post content that improves peoples' lives*
- ✓ **Listen** – *understand and empathize with your audience*
- ✓ **“WIIFM”** – *clearly articulate what's in for your audience*
- ✓ **Call to action** – *have a clear, well articulated 'ask'*


CONTENT DEVELOPMENT

→ **Your existing stuff:** Look at your highest and lowest performing posts. Replicate what works, eliminate what doesn't.




Top Posts


 **Filene Research Institute** shared a [link](#) - February 18 1:04 PM

We are seeking #creditunions and other financial institutions to test programs, derived from our research, to better serve the needs of un- and underbanked minorities that are adversely affected by a lack of access to financial services. With support from Visa, we are moving fast to help all financial institutions expand their reach to these families and individuals--many of whom can't wait any...




Reaching Minority Households | Supported by Visa
filene.org




 42  2  5

 **Filene Research Institute** shared a [link](#) - February 24 7:00 PM


"In the Filene Research Institute pilot, the participating credit unions made loans to more than 3,000 borrowers, for an average amount of just under \$1,000. The average savings was \$290. That may not sound like a large amount, but for many people, it can provide at least a minimal safety net. In a survey of 146 of the borrowers from nine credit unions, 94 percent said the loan helped with an ...

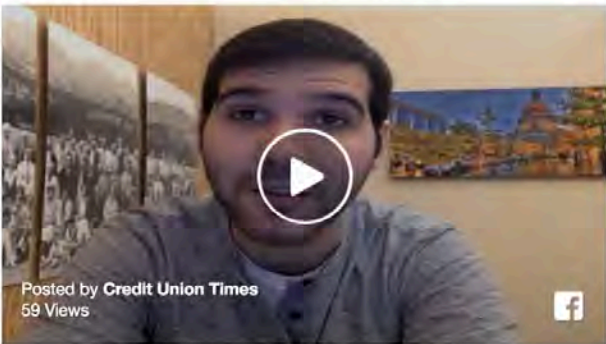


Credit Unions Turn Borrowers Into Savers
nytimes.com

 27  0  18

Weakest Posts

 **Filene Research Institute** shared a [video](#) - February 1 1:51 PM







Posted by **Credit Union Times**
59 Views

Some sage (and fancy-sounding) words of wisdom from our The Cooperative Trust manager, James Marshall on #creditunions and #leadership:

- 1) Make it your career and make a difference with it
- 2) Innovate like you never have before
- 3) Ask for help when you need it

Congrats on your Trailblazer 40 Below cred, James!
(Via Credit Union Times)


 1  0  0

 **Filene Research Institute** shared a [link](#) - February 11 1:40 PM

The stories behind the impact that a #creditunion can have on people's lives speak for themselves...

For credit unions:

SchoolsFirst Federal Credit Union is dedicated to helping improve the lives of our Members regardless of their financial situation. By participating in the National Credit Union Foundation Non-Prime Auto Loan program, we can ensure consumers have access to affordable payment...



CONTENT DEVELOPMENT

- **Develop original content:**
Create a plan for video, blog, podcast

	A	B	C	D
1	Channel ----- By Week	BLOG (Published weekly on Thurs.)	PODCAST (Posted monthly on Tues.)	VIDEO (Posted 2-4 times per week)
2	FEBRUARY			Fun Week at Filene / photos
3	2/1/2016	Focus Leads to NEW Jobs // By Mark Meyer // Published 2/4		
4	2/8/2016	AFS Incubator Focus - why are we doing this and what is the value; AFS program results // Andrew to author // CTA is contact Andrew / how to get involved		
5	2/15/2016	QCash/Impact focus-- linked to CFPB ruling for CUs to offer short term loans, Ely to author	Test Pilot: What's been going on at Filene so far in 2016? Interview George on Scotland trip. Mark on CoE and in general also cover Filene Focus Strategy. May include RMH, other research outputs...	Slideshow of photos
6	2/22/2016	CoE Big Announce -- MM		GAC Photo slideshow / TogetherWeCan Slideshow
7	MARCH			
8	2/29/2016	IAMT Output -- Cynthia / Annamaria's forward to research converted into blog		

Video
Post

Video Performance In This Post

- Minutes Viewed: 31
- Unique Viewers: 136
- Video Views: 163
- 10-Second Views: 74
- Average % Completion: 83%

Filene Research Institute

Original Post : A brief snapshot of our week at Filene and out and about in the #CreditUnion world we love so much

0:14 · Uploaded on 02/05/2016

Content Generation Form:

Name:

Department:

(Answer any of the following that are applicable to your experiences)

What is a common inquiry you receive from customers/members related to your role and what do you tell them?

What is one of your favorite 'feel-good' stories you witnessed or heard recently?

What are you most excited about telling customers/members, or wish to explain about your department or the credit union in general?

What is newsworthy related to your area of expertise, your skills related to your role or the financial services industry right now?

If you could leave three bites of information/news/knowledge with members as they walk out of the credit union, what would it be?

What gets you up in the morning or what keeps you up at night related to your area of expertise in your role?

WHERE TO SOURCE ORIGINAL CONTENT




- **Industry/Community Events** – *a wealth of content can be sourced.*
- **Media** – *watch for hot topics related to your industry in the news.*
- **Leaders, experts and product lines** – *use industry leaders, products that are key to corporate strategy.*
- **Rotating contributors*** – *enthusiastic, skilled, expert staff in HR, Lending, IT Security, Front Line, etc...*

CONTENT DEVELOPMENT


- **Be your brand, genuinely:** Are you quirky? Serious? Friendly? Bold? Caring? Find your 'niche' tone and show it on social media.

Post Details

Reported stats may be delayed from what appears on posts

**Filene Research Institute**
Published by Holly Jean Fearing [?] · February 19 at 1:40pm · Madison, WI, United States ·

For our [#FridayFileneFun](#) this week: we're starting a Filene Podcast series called the Filene Fill-in, (we like alliteration) and we wanted to share our Episode 0.0 demo take. Set to launch officially next month, we did a quick test run this week to figure out our equipment, concepts and process to make this a fun and informative communication channel for all our Filene friends. It's a raw and unedited take of a conversation with George and Mark. We'll be adding music, bells and whistles for our real show, but let us know what you think of our test run!




The Filene Fill In Pilot Episode


The Filene Fill In -- A Podcast where we fill you in on what's been going on at Filene Research Institute. This is our just for fun test episode featuring George Hofheimer and Mark Meyer.

[SOUNDCLOUD.COM](#) | BY USER-306424525

1,311 people reached

[Boost Post](#)

 Brent Dixon, Jeremiah DeGolon and 14 others

2 Shares 

1,311 People Reached

39 Likes, Comments & Shares

32 Likes	16 On Post	16 On Shares
2 Comments	0 On Post	2 On Shares
5 Shares	2 On Post	3 On Shares

105 Post Clicks

0 Photo Views	29 Link Clicks	76 Other Clicks
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NEGATIVE FEEDBACK

0 Hide Post	0 Hide All Posts
0 Report as Spam	0 Unlike Page

THE HIERARCHY OF CONTENT

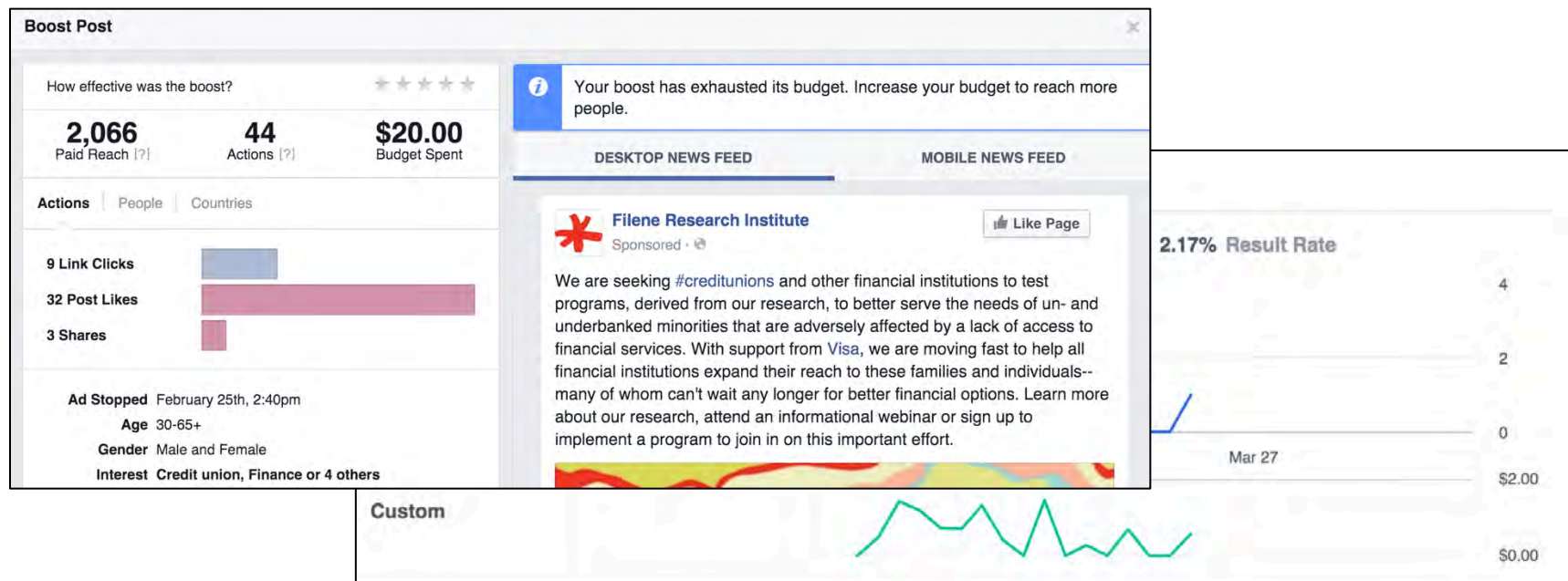
1. Videos
2. Podcast / Audio recording
3. Articles / Blog posts
4. Images
5. Quotes / Sound bites
6. Details / Statistics / Links



Why is video content king?

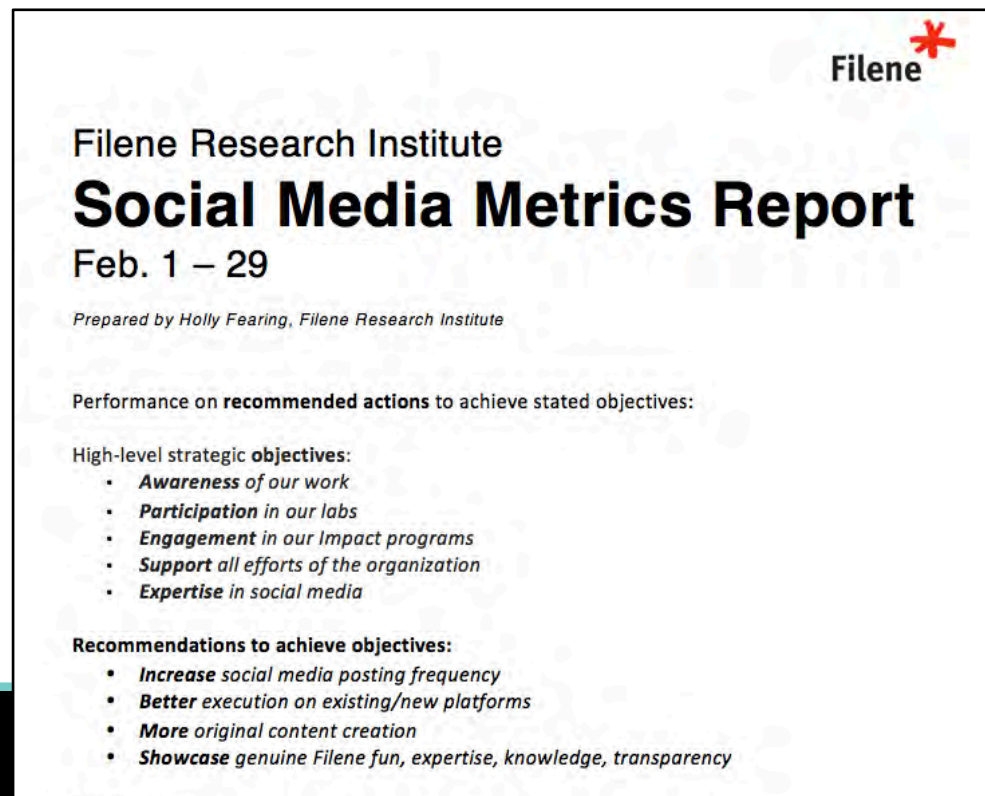
PROMOTING YOUR CONTENT

→ Try boosting posts and social media advertising:



METRICS AND SUCCESS MEASURES

- **Zone in on metrics that matter:** Know your objectives and goals so you know what numbers and metrics to measure toward success. Don't obsess on 'vanity metrics' over signs of engagement.



METRICS AND SUCCESS MEASURES

- **Awareness** = more interactions on posts (esp. shares, mentions)
- **Participation/Engagement** = more attendees and inquiries

Top Performing Post:



Top frequently used Hashtags and Most referenced users:

TOP HASHTAGS

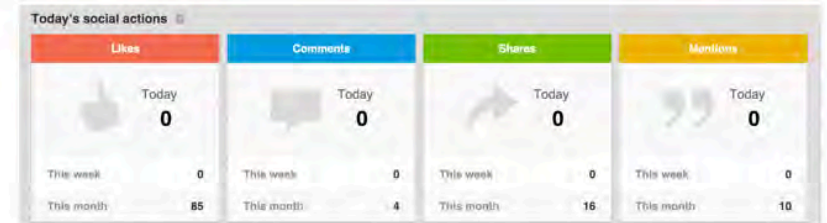
#creditunions	25
#togetherwecan	22
#socialmedia	16
#creditunion	14
#webinar	14
#cunagac	12
#financial	8
#crashthegac16	7
#innovation	5

USERS TALKED ABOUT

VisaNews 72,014 followers	9
Ford Foundation 101,327 followers	6
Randy Smith 10,841 followers	5
CUNA Mutual Group 7,452 followers	4
Tansley Stearns 904 followers	4
CUNA 3,974 followers	4
Mark C. Meyer 166 followers	3
Federation of CDCUs 1,117 followers	3

LinkedIn:

We had 16 posts on linked in, an average of 3-4 posts per week. We had 85 likes, 4 comments, 16 shares and 10 mentions on our posts. Followers increased from 1,387 on Jan. 1 to 1,496 on Feb. 29.



All combined, our Facebook Twitter, and LinkedIn pages drove 17% higher traffic to the Filene Website in February. (See Tiffany's Marketing Presentation for more details).

Others:

Instagram: Relaunched platform on 2/19. Posted 6 photos during GAC with 59 like received across the 6 images at the time of posting. Increased followers from 98 to 212. This platform will be used to supplement Facebook content and to drive traffic to site on key releases of content such as new reports, blogs and podcasts. It will continue to mainly be used for events and live action sharing.

Blog: Published 4 blog posts in February – plan is to post 1 new entry per week. Continues to be a huge driver of shares/Retweets on Facebook, Twitter and LinkedIn.

Podcast: Produced 'test episode' to good results in February. Full-length Episode 1 launches in March.



- | | | |
|--|---|---|
| <ul style="list-style-type: none"> • 1-2 full time staff dedicated to running social media strategies and execution • Larger budget for tools, monitoring, advertising and consulting experts • Can manage basic channels plus blog, podcast, SEO, customer service, contests, giveaways, strategy mapping and measuring • Can manage social PR efforts • Can run brand ambassadors and influencers program | <ul style="list-style-type: none"> • 1 partially dedicated staff (10-20 hrs/week) running social media strategies and execution • mid-size budget for tools, monitoring, and consultants; likely no ad budget, use free tools • Can manage 2-4 social media channels plus blog/videos occasionally, but likely not podcast, customer service, brand influencer program or contests | <ul style="list-style-type: none"> • 2-10 hrs/wk; likely marketing staff with many other roles • No or minimal budget for tools, monitoring; no advertising;; strategic consulting only when built in budget far in advance • Can only maintain basic channel presence, less than ideal frequency and minimal engagement; no videos, campaigns, contests, programs |
|--|---|---|

KNOW YOUR LIMITS

EXECUTING PLATINUM, GOLD OR SILVER

"Consumers today connect with brands in **fundamentally new ways**, often through media channels that are beyond manufacturers' and retailers' control. That means traditional marketing strategies must be **redesigned to accord with how brand relationships have changed.**"

"From Presence to Purpose: Developing Social Media Strategies and Metrics for Credit Unions" Schau & Schau, Filene Research Institute, Oct. 2013

Q&A Wrap Up

Type your question in the chat panel 

Holly Fearing
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[@FearingHolly](#)
[@FileneResearch](#)



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**Presentation materials and video replay
will be provided within one week.**

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Thank You.

