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Social Media Client Benchmarking Template

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Client	
Date of Audit	
Notes on purpose of audit	

This document is a work in progress but provides a framework for the collection of data as part of the creation of a social media strategy for a client. It has been published to encourage feedback from other digital professionals and to demonstrate to clients some of the thinking that is necessary to address properly their social media and web presence. If you use it in your own work or have suggestions for its improvement then please let us know.

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Which of the following exist for the business or brand?

	Presence	Comments
Website		The purpose here is to establish a benchmark for the work they have done so far in establishing a web and social media presence. An effective site, for example, should be supported by other channels. With over 350 social networks it is worth focusing at this stage on only the major players.
Campaign microsites		
Separate Blog or blogs		
Facebook		
Twitter		
Youtube		
Get Satisfaction		
Other social networks (list)		

Reactions to and goals for social media

Question	Reactions	Comments
Strengths and weaknesses of current web presence		These questions are all aimed at establishing whether their heart is really in it. Without the commitment from senior staff any attempts to improve the company's digital strategy are likely to fail. They need to see that social marketing is much more than just ticking the "have Facebook account" box and is linked to their marketing, PR, email and analytics activities.
Social media goals?		
What companies do they admire for their social media/digital strategy success?		
Who has responsibility for social media in the organisation?		
How will measure the impact of any changes they make?		
What tools are in place to help with this measurement?		
What are the senior staff reactions to tools like Twitter and Facebook?		
Is there a culture of allowing staff to access social media during the working day		
What is in place to help the company deal with adverse comment and discussion on social media sites now?		
What are the email marketing processes in place for the organisation		

List four major competitors

Competitors	Web	Cam	Blog	Face	Twit	You	Get
Comments	Establishing who the competitors are and how well they perform on the web and socially will help establish benchmarks and goals for the company and the brand.						

List key phrases that define how the company or brand would expect to be found in the search engines

Key words or phrases	Demand	Visibility	Comments
			These should be based on real needs as likely to be typed into search engines or expressed in. While brand terms are important, more than half of these should be generic market or industry terms.
			Use one of the software tools available to assess demand.
			Then assess how visible the client is for each of these terms. This will help the client understand more about their terminology and how for they have to go.
			Check that their competitors really are their competitors in terms of these terms.
Notes on competitors			

Website

Repeat for campaign microsites and blogs. Collect screen grabs (for later annotation) to illustrate each of the features explored. Use appropriate analytics tools to capture the data automatically. Repeat for well preforming competitors.

Feature	Website	Campaigns	Blog	Comments
Assess the visibility of the website				How well is the current site positioned in the market?
Look to see if it has been structured around landing pages				Landing page design makes it easier to link from campaigns
Perform standard SEO checks: content layout, titles, tags, urls				Look for barriers to visibility and natural reputation (search)
Test out visitor journeys				Make sure that different types of visitors are supported
Look at how regularly it is being updated				Look for evidence of a content plan
Notes on competitors				

Facebook

Feature	Notes	Competitors	Comments
Assess the presence of the company or brand on Facebook			Is there are official or unofficial presence? Has it been thought through?
Look for staff involvement with Facebook			Many companies will have a poor presence while their staff are active on Facebook
Look to see how well they use Fan Pages			Fan Pages provide powerful tools for developing a brand presence
Links to company or brand site			How is Facebook being used to drive traffic to the main web presence?
Record numbers of fans			Make a note of the current numbers of fans
Last time their Facebook presence was updated			Make a note of the date when an update was made to the page (by the company)
Specific Facebook apps or automation			List any evidence of the use of apps by the company
Fan us on Facebook on site			Links from site to Facebook are important

Twitter

Use Twitter Analytics tools to measure how well they are doing compared with their competitors.

Feature	Notes	Competitors	Comments
Biography and background			Does this help set out the goal of the company?
Styles of tweets: Publishing			Pushing data
Questions			Asking for information
Signposting			Helping their followers
Conversation			Engaging their followers
Links to company or brand site			How are they driving traffic back to their site?
Number of followers			Record as baseline
Influence			How influential are they likely to be
Reach			How many people can they reach through their followers?
Recency			How often are they tweeting?
Follow us buttons on site			Needed to drive fans
Retweet buttons next to content			

Blogs and comments

Feature	Notes	Competitors	Comments
How are they monitoring reactions to their organisation or products on blogs or posted in comments?			Blogs are some of the most powerful drivers of both community and reputation. Bloggers are likely to talk about a successful company or its products and the client will want to be involved with this process. They may want to set up their own blog to be more in control.
Is the company participating in responding to comments?			
Who are the powerful bloggers in their industry?			
Does their own blog or presence on services like GetSatisfaction help them provide a place for customer discussion?			

Actions

This is simply a list of some of the actions that the client may need to consider.

Action	Notes	Priority (1-5)	Deadline	Budget
Define social media guidelines and plan for the company				
Improve Facebook presence				
Define fan acquisition strategy				
Improve Twitter presence				
Define follower acquisition strategy				
Improve blogging sites and comment processes				
Define YouTube strategy				
Set up social monitoring software and processes				
Define calendar of social activity				
Define internal staff roles for social marketing				
Define role with agencies to support activities				
Link social activities to defined KPIs				
Define how company will respond to criticism				