

Foundations First.

How to Outsource Your Social Media

**Your no-nonsense guide to
avoiding cash flow leaks from
social media outsourcing.**



Contents

Don't outsource your social media before considering the following:

01. Outsourcing Readiness Assessment

Let's see if you're ready to outsource your social media efforts.

02. Why Social Media, and Why Now?

What social media can do for your business as well as some mistakes to avoid.

03. Approaches to Social Media

You are likely in one of two social media camps. Is your social media 'billboard/drive-by social media' or 'social' social media? Where are you on your social media outsourcing journey?

04. Expectations, Warnings, and Rewards

Disappointment comes from misaligned expectations. Let's fix that!

05. Your Realistic Hiring Guide

When you're ready, here's a guide to help you choose an expert or specialist to match your needs.

06. BONUS! Setting Expectations Worksheet

When you're ready to outsource, use this worksheet to set expectations and goals with your new hire! Do NOT hire without it!



First, a disclaimer.

This guide is relevant for marketing departments of all sizes, business owners, solopreneurs, entrepreneurs, and anyone with the inkling that something is amiss in their digital marketing machine.

Most companies aren't even sure what "doing" social media really means. You know how after your car breaks down you just sort of pop the hood and take a look around? Well, are you actually doing something? Or are you just looking busy?

There's a lot of that going on when companies "do" social media. All too often, companies just go through the motions. They dive in without a complete picture of what "doing" social media actually is. So, we've created this guide to help businesses navigate the misunderstood world of social media.



01

Are you ready to outsource?

We put this right up front because people tend to like self-assessments. They just do. You may already know what type of wine or dog you are. Cool. Now figure out if you're truly ready to hand off your social media.

Take a minute and check your outsourcing readiness. You might not be 100% ready, and that's okay. The assessment will flag some areas to work on.



Social Media Readiness Assessment

Check 'yes' or 'no' for each question below:

		YES	NO
1	We have a list of all our social media accounts and who has access to them.	<input type="checkbox"/>	<input type="checkbox"/>
2	We know exactly who we want to reach using social media (aka our target market).	<input type="checkbox"/>	<input type="checkbox"/>
3	We have at least one measurable goal for our social media efforts.	<input type="checkbox"/>	<input type="checkbox"/>
4	We have both time and money budgeted for social media.	<input type="checkbox"/>	<input type="checkbox"/>
5	Our website is set up to track conversions, and I know where to access the information.	<input type="checkbox"/>	<input type="checkbox"/>
6	I know myself well enough to know I can let go of some control.	<input type="checkbox"/>	<input type="checkbox"/>
7	I have used social media myself and have a basic level of competency, so I'm not afraid of the platforms.	<input type="checkbox"/>	<input type="checkbox"/>
8	Our company is open to ideas on how to best use social media.	<input type="checkbox"/>	<input type="checkbox"/>
9	We have clear brand guidelines and verbal identity.	<input type="checkbox"/>	<input type="checkbox"/>
10	We have at least a part-time FTE to manage/oversee social efforts.	<input type="checkbox"/>	<input type="checkbox"/>
TOTAL NUMBER OF 'YES' RESPONSES		_____	

How Did You Score?

If you ended up with less than a perfect 10, you might want to focus on the items you said NO to prior to hiring. If you feel you want to proceed anyway, consider hiring a heavy-hitter so that person can help you set up and manage some of these items.



02

Why social media and why now?

You've read this far, so you probably know social media can do something for your business, but you can't see it clearly yet. Let's talk about what that "something" is so you have a clearer view.



What social media can do for your business.

Social media is one piece of your digital tool kit. The sooner you understand how to use this tool, the sooner you'll see results.

The biggest thing to know about social media is that it's just one isolated piece of your company's digital marketing effort. To really nail it, *you need to get everything working together*. Your social media specialist needs *quality, shareable content* in order to drive traffic. You need to *set up analytics* to figure out what's working and what isn't. And *all of the above influences SEO*, which affects visibility, and so on and so forth.

So, even though this guide is looking at outsourcing your social media programs, keep in mind that *most companies need a foundational checkup* to avoid cash leaks and spending money in the wrong place. This is where a *digital assessment* comes in.

A *digital assessment* gives your business just the right blueprint or plan. It's a critically important step that focuses your efforts.

We can help you wrap your head around all this. Feel free to reach out to learn more about our digital marketing audit. Even if you're already in the doghouse, we can rescue you and get you on your forever path.



Doing social media... what does it mean?

Companies that get the most out of social media are doing it for the right reasons. Let's take a look at some of the most common reasons companies want to utilize social media:

BAD Reasons To "Do" Social Media

- The fourteen-year-old kid who mows your lawn said you should "do" social media.
- You're jealous of your competitors' posts.
- You just *think* you should be on social media.
- You want an incognito way to check up on your high school crush.

GOOD Reasons To "Do" Social Media

- You want to use all the tools at your disposal to spread the word about your business and generate new leads.
- Your customers are on social media and you want to engage them where they already hang out.
- You're tired of manually printing out a hard copy of your tweets and handing them to strangers.

03

How you approach social media.

You're likely to fall into one of two camps when it comes to your current social media execution.

We call these two approaches:

Drive-by Social Media
and 'Social' Social Media.

Both are viable options, but each have different objectives. Let's look at what each approach looks like, pros and cons, and expected outcomes.



Drive-by social media is all about visibility.

Goal:

The goal of this type of social media is to *ensure people see your brand is active* on social media. You're really looking to build credibility by appearing active and not dead.

What Does This Look Like?

- Sharing your blog content across social networks.
- Not really engaging in social interactions.
- Sharing curated (third-party) posts to your page without much original commentary or value-add.
- Posting lead-generation ads for white papers or ebooks.

In marketing, it would be akin to going to a networking event and talking to a wall. You're definitely "out there," and you might meet a really sexy wall with a mysterious past. But you're missing a golden opportunity to engage a ton of people.

Pros

- It's *cost effective* in the sense that this is the cheaper and quicker approach.
- It's *easier*—you don't have to be as "on top of it" when it comes to monitoring comments and engaging in conversations.



Cons

This path isn't "true" social media, since you're not actually engaging anyone. Your reach and influence will plateau, and you'll have to rely heavily on paid efforts.

In other words, the money you hoped to save with the cheaper approach ends up costing you through promotion or missed opportunities.

Outcome

You'll get leads and some engagement, but you'll have to pay to play. This is fine for a short-term strategy, but it amounts to more of an advertising platform than anything else.



'Social' social media is all about connecting with people.

Goal

By starting conversations, joining conversations, and sharing your knowledge, *you're adding real value.*

What Does This Look Like?

- You're checking your social networks several times throughout the day.
- You're adding meaningful long-form comments and engaging with other human beings.
- You're likely sending private messages and inviting people to connect.
- Your goal isn't merely to increase your numbers; you're expanding the number of legitimate connections.

Returning to that networking event, this approach means you leave with 20 new friends, keep in touch, and cross-pollinate to integrate and grow your business.

Pros

This is how social media was meant to be used. The platforms are built to support this kind of engagement. You're creating a gift that keeps on giving. You'll make genuine connections that won't just go away if you stop posting for a week.



Cons

This is a long-term play and *takes time*. You're planting seeds and need to commit if you want those seeds to grow.

This can also make you feel a little vulnerable, because to build genuine connections, you can't post inane boilerplate garbage. You need to actually *show your best self online*. Your company should have a personality, and this approach requires revealing it. Business is done between people, and in this approach, you need to be a person.

Outcomes

You position yourself as a thought leader, because you're sharing your point-of-view and attracting those who agree. You should start to:

- have conversations with prospects
- generate leads
- book strategy sessions

Your reach will grow over time, and you won't need to be dependent on paid ads. If you post meaningful content, you should get organic engagement that drives interest and leads.



The outsourcing journey.

We've noticed most companies take pretty similar paths on social media. Over time, their comfort level grows. So do their expectations. Most companies can handle social media themselves in the early phases.

But there's a time when it definitely makes sense to outsource. For that reason, we'll lay out a fairly common trajectory to give you a sense of when outsourcing is right for you.

Expectations you can likely meet on your own:

Phase I:

- You post two or three times per week across your platforms.
- You share your own content.
- You comment a few times per week on other people's posts.
- You figure out how the platforms work.
- You make mistakes, freak out about every typo, and then realize the typo wasn't that big of a deal.
- You post a picture standing in front of a wall that makes you look like you have angel wings.



Phase II:

- You join some groups and play around with boosting posts.
- You no longer feel anxious about posting.
- You feel comfortable.
- You add Hootsuite, Loomly, Sprout, or another sharing and scheduling tool that connects all your accounts.
- You use social media technologies, even though they are more 'hands-on' than you'd like.

Phase III:

- You're starting to spend a good amount of time on social and are looking for ways to hand some of this off. You start by trying to hand this off to robots.
- You understand the technology isn't perfect; sometimes the posts hit at the wrong times, but you're willing to keep living like this for now.

Outsourcing using the drive-by social media approach:

Phase IV:

- Now you're ready to use social media strategically. You develop a strategy and hire an eager young gun to execute.
- You're definitely getting some help but also chaperoning.
- The young gun unfortunately vapes indoors.

Phase V:

- You hire based on your budget, goals, and you approach the hiring process with clear expectations.
- You let the social media person do their job.
- You use our handy dandy guidelines to communicate your goals and brand message and let them work their magic.



- You may need to try out three to five social managers before finding the right fit for your brand and voice.

Outsourcing using ‘social’ social media:

Phase VI:

You’ve finally found a fit and are ready to truly invest in this.

- You have in mind what you will need to pay for the results you want.
- You’ve found the right partner to deliver on all that.
- You stay out of the social media manager’s way and focus on growing your business.

Phase VII:

You’ve built trust with your social media manager and are looking to that person for guidance on how to amplify your reach.

- If your social media manager is *not capable* of chiming in with strategic feedback or collaborating at this level, it’s time to upgrade, because there are social managers who can be a real asset during this phase.

04

Outsourcing expectations, warnings, and rewards.

Hiring someone to 'do' social media requires a more dogged approach than hopping on Fiverr or UpWork for 10 minutes. Well, it does if you want social media to work for you and not just burn through cash with no results.



You get what you pay for.

Time and time again, you've no doubt heard "you get what you pay for." So why do we ignore that so readily when it comes to our digital marketing? If you want the right leads, trust in your investment.

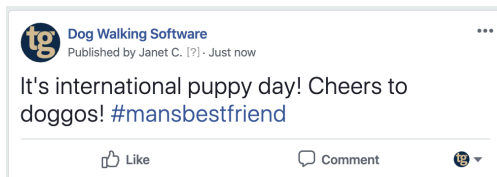
As with all things, when you're outsourcing, you get what you pay for. People who can add real value know it and definitely charge for it. You're not just paying for their time but for the skill set it's taken them years to build.

To make sure you're getting your money's worth, don't think only about how much you're paying. You need to take that second step and ask yourself what you're getting in return. Are you treading water? Or are you truly moving toward your goal?

To build a common language, take a look at a cut-rate, value, and premium social post. On the following page are examples of the same post done three different ways:

Three samples of social post quality:

1 Minute Post



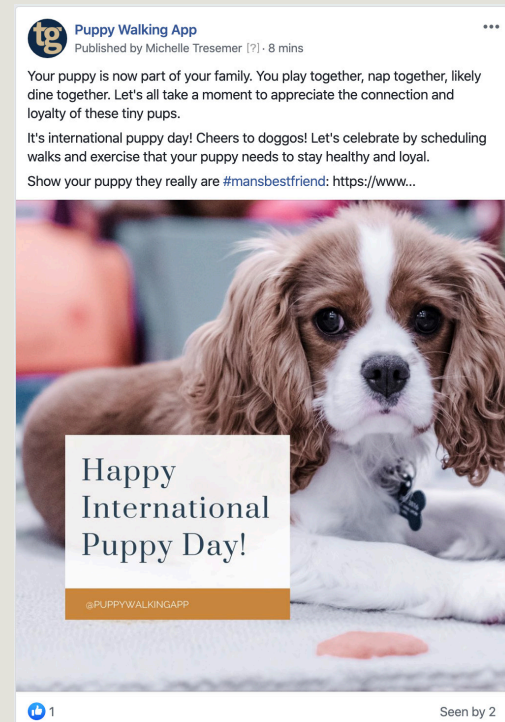
- Low-skill required and quick to produce
- Doesn't do much except make you look "not dead"

10 Minute Post



- Includes an eye-catching photo
- Links back to the website
- Adds value by promoting a guide

30 Minute Post



- Tells a story to inspire action
- Grabs attention with big image with branded content on top
- Links to the site with a clear call-to-action
- Landing page has a form to submit to get the guide so you can follow up via email and more campaigns
- Speaks directly to the health of puppies which works for the fictional puppy-walking app rather than a generic message
- Can boost and track conversions



The hidden costs of social media.

We see a lot of companies try the Drive-by approach, and while we mentioned its merits, this strategy ends up leading companies into “outsourcing limbo.” They hire someone cheaper but also someone that needs a layer of review and sometimes a little coaching. That additional commitment adds hidden costs. There’s no room for micromanaging in social. If they can’t truly let it rip on their own, find someone who can.

Another hidden cost is—well—just generally getting screwed. When you hire a bookkeeper, you need someone who’s going to post the right filings on time, be up on the latest regulations, and someone who isn’t skimming the books. The hidden costs could be disastrous if your bookkeeper doesn’t check the right boxes!

There’s a similar level of due diligence required when you outsource social media or any digital marketing channel.

Know enough to hire well and not get screwed.

If you want to know more about what to look for, we can talk you through that. But everyone at your company, from the founder, to the CMO, to your operations manager should have a base understanding of social media and the part it plays in digital marketing.



Get what you really need!

You do NOT need to just check “do social media” off of your strategic plan to-do list. You NEED to use the tool to get leads and sales. It’s okay to start small but start with a clear intention.

You can’t just “tack on” social to another position.

The most common question we get is definitely, “Can’t Bella just do social media?” To answer that question, we first have to know exactly who Bella is. Is she the intern or office manager and you’re just piling this onto her list? Is Bella a cut-rate content person who’s going to make a post and then leave it for dead? Because if that’s who Bella is, then she’s definitely bringing a knife to a gun fight.

Social networks go far beyond Facebook, LinkedIn, Twitter, Pinterest, SnapChat, and Instagram. Specialists deal with platform changes, security risks, increasingly complex user management, a dizzying number of pages and ad accounts, transparency changes, algorithm changes, UI changes and troubleshooting, new platforms like Tik Tok... they deal with all of that and much, much more.



Did you know, for example, that your Facebook ads might not perform if there's more than 20% text on your images? Little details like that can make or break your campaigns. And asking Bella to troubleshoot all that while she's updating Adobe Acrobat for the twentieth time can salt away her entire day. Asking someone to "take on" the extra workload is unfair, and more importantly, it can really hurt your marketing effort.

Social media is a highly specialized skill set that's 50% art and 50% science. You need someone who can make your web presence look good, then track, analyze, and tweak. You basically need someone who's not Bella!



Honesty time! Tell or be told!

I don't tell my accountant what to do. I pay her to tell ME what to do. Why? Just because I have a checking account doesn't qualify me to know the ins and outs of international tax accounting. Do you see the correlation here?

When you're hiring a social media manager, make sure you have a good idea of what you want that dynamic to look like. Do you know enough to give this person very specific marching orders? Or are you looking to be advised? It's a question of "tell or be told." And it's an important one to answer before you collaborate.

Tell.

If you know enough about social media to direct and manage another person, and you have time to do it, you could potentially save a lot of money. This does, however, put the onus on you. You'll own the success or failure of the campaign. You can't hire someone for \$30 an hour and then turn around and blame them when leads are stagnant after six months. If they were capable of more they'd charge more.



Be told.

If you're looking for a sound strategy and someone who can set actionable goals, we recommend hiring a heavy-hitter social strategist. 'Heavy hitters' can help set reasonable expectations and draw a roadmap to get there. The better the social strategist, the more that person contributes.

You're going to pay more, but also get a lot more. You'll see real movement and actual results. After all, 'heavy hitters' aren't spending time posting team photos where everyone is in "mid-jump" on the beach.

If you're starting to rethink your approach to "doing" social media, then I'm doing my job. Keep reading!

Pro tip: Be prepared to hear 'no.'

When we get asked to 'do' social media, 80% of the time we end up convincing the company that they shouldn't be doing social media yet.

To really move the needle takes real time and a real investment. You need to be building on a solid foundation.

A good social strategist needs a basic tracking setup, clearly defined goals, a content strategy, etc.

We can help shepherd you through building that foundation. But we'll definitely want to know it's part of your process before we can start talking about launching a successful campaign.

05

Your realistic hiring guide.

If you are ready to hire, here are some guidelines!
Read through each level and consider

- Your budget
- Your own skill set
- Your approach to social media
- What you really need.

Then use the core competencies as part of your interview process to make sure whoever you hire can deliver on your expectations!



Getting started: Finding your social media resource.

After working with clients from around the world, we've learned there's one common denominator in social media: the pay is in line with the expectations.

If you're expecting the minimum, you'll find someone who will charge the minimum. But often times, people who charge a lot can also deliver a lot.

Always do your own vetting. But speaking broadly, the following is a great back-of-the-napkin calculation of what you can expect when you're heading into meetings.

Beginner

BUDGET: \$10-\$20 per hour

OUTCOME: You'll be telling them precisely what to do. They'll keep your social networks looking active. And they'll probably ask you a few questions they could've easily Googled.

CORE COMPETENCIES:

- Posting X times per week (generally you'll pay for a package of posts).
- Curating select content (sharing relevant third-party articles with basic commentary.)
- Using hashtags and tagging.
- Using proper grammar and spelling!



Virtual Assistant

BUDGET: \$10–\$60 per hour

OUTCOME: Very similar to the beginner. You'll be telling them what to do. And they'll keep your accounts looking active.

CORE COMPETENCIES: (in addition to previous stages)

The virtual assistant option is pretty similar to the beginner, but we're assuming the virtual assistant has a broader range of responsibilities. This gives them more context, which means they might be able to match your brand's voice a little better and possibly even recommend some content.

It's tempting to 'tack on' social media to your existing virtual assistant. Think that through carefully and review the VA's skillset first.

Intermediate

BUDGET: \$20–\$40 per hour

OUTCOME: This is where you'll start to see collaborators who can grow your audience with some engagement (likes).

CORE COMPETENCIES: (in addition to previous stages)

- Capturing your brand's voice and personality.
- Understanding of your brand's look and feel and using visuals consistent with that look and feel.
- Boosting posts.
- Running follower campaigns.
- Writing social posts and promoting your blog content across platforms.
- Using Facebook and Instagram stories.



Advanced

BUDGET: \$40–\$60 per hour

OUTCOME: You'll see a person who can start conversations and show real engagement in your target market.

CORE COMPETENCIES: (in addition to previous stages)

- Building a social strategy and content calendar.
- Recommending a content strategy.
- Managing conversations with your target market.
- Posting in groups.
- Identifying influencers to engage with.
- Creating measurable goals for their efforts.
- Running basic ad campaigns.

Super Star

BUDGET: \$60–\$80 per hour

OUTCOME: Leads. Sales. Glitz. Glamour (it's extra glamorous when you spell "glamour" the British and Canadian way).

CORE COMPETENCIES: (in addition to previous stages)

- Analyzing leads generated using social media.
- Analyzing leads generated through your website.
- Setting up and running social ads.
- Setting up tracking (using UTM parameters).
- Using Google Analytics or something similar for reporting.
- Creating actionable insights from data they've gathered.



Unicorn

BUDGET: \$80+ per hour

OUTCOME: This is social media bliss. You'll emerge as a thought leader, which causes leads to flow. You will dwell in the land of milk and honey. Everyone starts asking, "where the hell did you come from?"

CORE COMPETENCIES: (in addition to previous stages)

- Collaborating with content, PR, events, SEO, and webmaster specialists to leverage and support other digital channels.
- Reporting heavily on leads and revenue driven from social efforts.
- Pitching lead gen assets (checklists, quizzes, etc.) that will perform well on social.
- Editing and producing high-quality video content.
- Producing your Facebook, IGTV, and LinkedIn live events, then repurposing that content on other platforms.
- Translating all company-wide efforts into a digital content repurposing machine to share your brilliance across the internet.
- Because you're assumed to be brilliant across the board, everyone starts asking you questions about parallel realities.



What does this all mean?

If you're not a specialist, social media can seem like a lot. Ask yourself these questions before trying to build your company's social media presence:

1) Are we there yet?

Make sure your digital marketing ecosystem is all squared away before you try to tackle social media. That's the only way to maximize your effort on all fronts and bring in real prospects.

2) Do I truly have time for this?

'Doing' social media yourself can definitely work. But make sure you have time to actually do it justice. Remember, you're competing for leads against specialists who are fully committing.

3) Am I actually outsourcing?

Hiring someone to help out with social media can add a ton of value, but only if you truly give them the reins. If you hire someone who needs a chaperone, that'll cost you in terms of time and in terms of missed opportunities.

When it comes to social media, there's more than meets the eye. And if you've got it under control, great. But if it feels like a lot to unpack, we're here to help.

06

Bonus!

Setting expectations worksheet.

When you're outsourcing social media, we recommend creating a checklist like the one we've included. This helps set expectations, create a shorthand, and make sure your social media person delivers something you actually want and like.



How to use this section.

In addition to the following checklist, print out the “Social Media Expectations Worksheet.” Fill it in so you can have a clear conversation with your social media hire. It will keep everyone on the same page and ensure you both understanding the expectations of the project.

We’ve included a sample too!

Setting clear expectations means—you guessed it— documenting what you hope to achieve from the relationship.



Basic items to provide your social media hire:

Style Guide and Logos

- Image style examples
- Fonts
- Logo pack (vector files preferred)
- Design examples (provide ads, ebooks, or other design examples if you don't already have a social media graphic template)

Personas

- Provide detailed avatars for each target market

Brand Language

- What words should NOT be used
- What are the proper vernacular of brand products
- Core messaging
- Items that drive you nuts (ie. using "th" in dates)



Social media expectations worksheet.

Tech Stack

List out *all* digital marketing tools available.

Tool 1: _____

Who has access? _____

Tool 2: _____

Who has access? _____

Tool 3: _____

Who has access? _____



Budget/Month

Tools: _____

Stock Images: _____

Boosting: _____

Ad Campaigns: _____

Approval Process

Who needs to *review* or *approve* the following?

Social Posts: _____

Boosts: _____

Comments: _____

Follows/Likes: _____

Staff Contacts

Key Contact: _____

Content Producer: _____

SME Resource: _____

Webmaster: _____



Reporting

How often should a report be provided? _____

What needs to be included in the report? _____

How often do you want to meet to discuss the report? _____

KPIs & Goals

Goal 1: _____

Goal 2: _____

Goal 3: _____

Outreach

Key influencers to keep an eye on:

Name: _____

Name: _____

Name: _____

Name: _____

Name: _____



Content

Where will content come from? Blog posts? eBooks? Webinars?

Does the content above need to be created or will it be provided? _____

Hashtags to consider that have been used in the past:

Thought Leadership

C-suite/key leadership social accounts to tag:

Name: _____

Position/Title: _____

LI: _____

TW: _____

FB: _____

Other: _____



Name: _____

Position/Title: _____

LI: _____

TW: _____

FB: _____

Other: _____

OTHER NOTES: Any other notes your social media manager should know.



Sample social media expectations worksheet:

Tech Stack

List out *all* digital marketing tools available.

Tool 1: CANVA

Who has access? Bob is Administrator

Tool 2: iStockphoto

Who has access? Maggie C.

Tool 3: Sprout Social

Who has access? Maggie C.

Budget/Month

Tools: \$150

Stock Images: \$400



Boosting: \$1500

Ad Campaigns: \$2500

Approval Process

Who needs to *review* or *approve* the following?

Social Posts: Maggie approves all

Boosts: _____

Comments: _____

Follows/Likes: _____

Staff Contacts

Key Contact: Maggie C.

Content Producer: Mikey

SME Resource: Charles

Webmaster: Gretchen

Reporting

How often should a report be provided? Monthly

What needs to be included in the report? Engagements, traffic to the
website conversions from each social channel

How often do you want to meet to discuss the report? Monthly



KPIs & Goals

Goal 1: 15% increase in traffic to website per quarter

Goal 2: 30 leads per quarter

Goal 3: 5 marketing qualified leads per quarter (MQLs)

Outreach

Key influencers to keep an eye on:

Name: Jennifer L., Forrester

Name: Jordan A., Gartner

Name: Mike B., Gartner

Name: Alan A., Forbes

Name: 5 marketing qualified leads per quarter (MQLs)

Content

Where will content come from? Blog posts? eBooks? Webinars?

Lead gen team will create quarterly and monthly content.

Does the content above need to be created or will it be provided? _____

Will be provided



Hashtags to consider that have been used in the past:

#marcomtech, #saasmarketing, #technology,

#transformationalmarketing

Thought Leadership

C-suite/key leadership social accounts to tag:

Name: Janet C.

Position/Title: CEO

LI: /janetcceo

TW: @janetcceo

FB: @janetcceo

Other: _____

Name: Gary R.

Position/Title: VP Products

LI: /vpgary

TW: @vpgary

FB: @vpgary

Other: _____



OTHER NOTES: Any other notes your social media manager should know.

We need a baseline for efforts the first quarter and then want to adjust budget for Q2 and Q3 based on findings.

We expect you to work closely with the lead gen team to recommend content and repurpose existing content to keep our social accounts driving engagement and traffic back to the site.

We assume all tracking pixels will be in place within the first month.

Need More Guidance?

We're standing by with a complimentary strategy session to help you decide if you're ready for social media and help you hire the right resource. We don't "do" social media, but we want to help you get the resources you need.

Book a consult at wwwFOUNDATIONSfirstmarketing.com



I put together this document to meet a need. I saw friends, colleagues, and clients make costly mistakes when outsourcing their digital marketing. My hope is that this guide will help others more easily manage the challenges and magic of engaging with customers online.

*Michelle Tresemer
Marketing Consultant & Digital Strategist*