

How-to Build a Socially Armed Team

Where to Start, What you Need, and How to Get Organized



Before We Begin: An Introduction

What My Dad Taught Me About Social Media

My father owns a small business in California. Since I was very young I've been learning about supply and demand, customer relationships and integrity in business from my dad. I would say his approach to business and sales is very "old school" and by that I mean, brick and mortar. He sells the way that a general store owner would sell groceries, by getting to know his customers on a deeper level: he saw them once a week and truly cared about them and their success.

I think it's safe to assume that store owners—back when things were simple—would ask how each of your family members were, or if something remarkable happened they would know and be interested in the outcome. Until recently, it seemed that businesses had lost this sense of connection, they had lost the genuine curiosity for their customers, and they relied only on "messaging", "direct marketing" and flashing lights and sounds to almost hypnotize people into becoming their customers, rather than taking the time to get to know them. Thankfully things are changing.

Social media presents a tremendous business opportunity to build trust and relationships (like my dad did) in the digital age. But it needs to be managed across functional lines to ensure that you don't send mixed or confusing messages to your customers. This book is a guide to help you navigate your way through the complexities of integrating a company-wide social media mandate, to enlist and arm your team members of your social media army so they can engage your prospects like real people. In the end, you will humanize your company to build better, stronger customer relationships, in this brave new media world.



Case Study: Avaya Gone Social

Paul Dunay the Global Managing Director of Services and Social Media says listening is better than talking. It started as a way to engage and support customers but evolved into a company-wide mandate.

Social Profile

- Social media: 42 groups & 5 fan pages on Facebook, 10 international Twitter accounts for support, service and news, plus 12 LinkedIn groups
- Blogs: 1 public, 14 internal for communication between teams
- Collaboration: 15 internal wikis, plus 3,000 employees using Yammer the enterprise social network.

Tips for Social Engagement

- Talk to your customers everywhere they are
- Engage early adopter employees and leverage their passion & expertise
- Personalize your engagement with people, don't automate your social responses
- Listen more than you talk, and listen and track related topics and trends

Results

- 50 virtual team members working to monitor 1,500 - 2,000 mentions per week
- 1 Twitter post lead to \$250K within one week
- Ability to proactively intercept customer support issues before formal calls are made

One major misconception people have is that social media is something to be tackled solely by the marketing department, but that's really doesn't have to be the case. It's true indeed that Marketers have been early to adopt these new social ways of communication for business purposes, but in reality it's evolving them as marketers, not marketing itself. So as technology is changing, the behavior of marketers is changing as well. Their function is shifting from marketers to publishers, from talkers to listeners, and from selling to adding value.

Even though marketers are on the edge of the social media front, they are not the only ones who should be fighting in the name of better business (as a social media evangelist, this is what I fight for). In fact, many companies have leveraged social media for customer support, then parlayed that success to sell broader adoption to the executives, and bring more people on board.

It's more obvious everyday that social media is a business tool, and not just for marketing communications. Companies are already using social media to communicate and collaborate internally, and adoption and use will only expand. Future generations—the ones growing up “friending” everyone they know—a harbinger of things to come and critical dynamic to their success in business.

Social media has indeed had an enormous affect on marketers, I think for the better. It has forced us to think about things differently, to think like a general store owner, to care about the well-being of our customers, and to genuinely want to help them solve business problems. Today, the marketer has de-evolved from a mad scientist testing new technologies like “neuromarketing” that will brainwash you, to someone that listens to what you want, then acts in your best interest.

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Part One: Before You Get Started

There are two things you need to do before you get started with a social media. You need to first get buy in from your boss, and you need to decide what your objectives are going to be.

Getting buy-in From Senior Management

If you're reading this book, it's safe to assume that you "get" social media, and even though it's becoming more mainstream it's still not safe to assume that your boss gets it. Your boss will likely be concerned with the ROI aspect, and might not get ROE (return on engagement). The bottom line is that since social has been a catalyst for a business shift; you are going to need to present your case from a business perspective.

If you're planning to build a social team, then you better be armed and ready to articulate the value, and return on investment or "return on ignoring" as Jeffery Hayzlett CMO of Kodak calls it. His point about "ignoring" the conversations is that there are potential risks to your brand if you are not engaged. People are talking about you, do you want to be there to react, or do you want them to influence a negative brand image? And, not only crisis control, but really proactively engaging these people, and facilitating a community for them to engage with each other.

You need to put yourself in your boss's shoes and address the things that will most concern him/her upfront: how much is it going to cost, how does it perform in relation to traditional media, how does it affect customer retention, demand generation, brand presence, and image? It's best to do due diligence and have these questions answered before trying to sell the concept of social media to your boss or senior management, and it's critical to get their approval so there is a top down, company-wide mandate, while you build your team.

Making the Case to Your Boss

- Social media tools can be more effective than a traditional website, reaching a greater number of people in more formats like; blogging, social networks, social bookmarking, and video.
- The cost of implementation is virtually free, most social tools are open-source so there are no upfront fees.
- Your customers, competitors and prospects are already using social media to connect, research (through the buying stages) and respond quicker.
- Building groups or communities online can help with customer retention, customer-driven product development, and customer service calls.
- It can be used to help with customer prospecting or scoring, and deeper brand awareness and better brand image.
- Most customers think more positively about brands that have a social presence.

10 Things You Didn't Know

Define Your Objectives

There are many things that can be done with social media. It doesn't have to be all about marketing; in fact, it shouldn't be. It could also encompass product development, customer support, community development, demand generation, lead nurturing, awareness for a cause, reputation management and more.

Every company will have different goals, but it's important to have a clear objective before you begin so you can organize the appropriate resources. Here are potential objectives:

- Become known as the “expert” in your industry
- Increase awareness & build online community
- Widen your funnel or nurture prospects
- Foster better relationships with customers & ambassadors to strengthen relationships to facilitate brand ambassadors
- Increase inbound leads—prove social marketing matters to sales

When setting goals be sure to include benchmarks. It's important to know where you stand so you'll be able to track successes. If you have not done any social media, this will be easy because you are starting from scratch, but if you've already started and are working to achieve a greater impact, you might start with these benchmarks:

1. Blog - traffic, feed subscribers, comments, trackbacks, and links
2. Social networks - followers, fans, RTs, members, and mentions
3. Content - video views, shares, links, etc.

- In 2010, 37% of employers plan to put greater emphasis on social media to create a more positive brand
- Over the next year, 1 out of 5 employers plan to add social media responsibilities to a current employee's responsibilities
- In 2010, 1 in 12 companies plan to hire someone new to focus on social media
- During 2010, 66% of companies plan to invest in social media marketing
- 40% of companies are shifting \$ from traditional direct marketing channels into social
- 79% of Fortune 500 companies use Twitter, Facebook, YouTube or Blogs to communicate
- Twitter is the most popular tool for fortune 500 companies, averaging of 4.2 accounts
- By 2014 social networking sites will replace email as the primary interpersonal communications for 20% of businesses
- By 2010 over 50% of enterprises will use activity streams that include microblogging to communicate internally
- In 5 years 70% of collaboration and communication applications designed on PCs will be modeled after user experience lessons from smart phone collaboration.

Part Two: Planning for Success

Create a Social Strategy

It's important to have at least a loose idea of the strategic direction you plan to take with social media so you can be sure to draw on the appropriate resources. Each department of your company has different goals, and they are going to want to emphasize the things that are important to the success of their teams. However, it's critical that there's a common goal that unifies everyone's efforts.

You'll want to build a strategy that leverages each departments' strengths and resources because you will want to provide the cloud conversations with a balanced perception of your company, brand, and culture.

The foundation of a good social media strategy is quality content that allows you to stay engaged in conversations with customers and prospects online. You can start by auditing your current content, but focus on pieces that are more educational such as; how-to guides, quick tips, or 10 steps to... These perform much better than traditional product-focused pieces. The idea is to provide value to the community to help support them in their knowledge and decision about your space.

You'll also want to determine which social media channels are popular for your prospects. Find out where they hang out, and how they like to consume content—what formats do they enjoy the most, and how often do they like to receive information or correspondence.



Organize Your Social Media Resources

Take an inventory of what tools you have that can be leveraged, or who can help with this quest, and identify all resources available to you. Do you have budget allocated for paid monitoring tools, hiring additional staff or agencies to help manage or design campaigns?

When it comes to resources, people tend to think 80:20, but with social media it's more like 95:05. With social, think 95% people power, and 05% paid power, or tools. If you plan to orchestrate successful implementation of social media engagement, you'll need to make sure that everyone involved is given time to spend in this medium—learning, listening, and responding. Consistency is key, so keep in mind that ten minutes a day is better than an hour a week.

Understand the Special Needs of Social Media

Due to the nature of social media and the ability to communicate at light-speed, social media has very special needs. Not unlike most marketing campaigns, there are various resources that need to be pulled together to make your presence out there is rounded, unique and consistent.

One major need of social media is the power to constantly publish without getting stuck in the minutia of corporate processes. If you can, it's best to assign one person the responsibility of organizing and publishing all social content. If you have many people contributing content, but you want to keep strict quality assurance over the content your team can publish, there are collaboration tools that will let you to set up approval processes, so people can't just post whatever they want, but ultimately there should be one gatekeeper responsible for organizing the creation of content and a schedule for publishing it.

You may need...

- Blog
- Bloggers
- Content manager
- Webinars
- Social strategy
- Blog posts
- Listening tools
- Publishing tools
- URL Shorteners
- Email campaigns
- Creative
- Web Design
- Programming
- Calls-to-action
- Social Profiles
- SEO
- Videos
- More content



Part Three: Team Building

As a company, you are one team, but within the team there are sub-teams or departments, so creating a socially armed team may mean some training is needed. It's good to think about what the specific objectives are for each department, and then consider how to leverage social media to achieve the individual needs of each department, while projecting a common message and experience.

Leveraging internal resources is the most effective approach. The people within your company are the best evangelists, they believe in what you're doing, and want to be successful. They can all be considered experts within their departments, and exploiting those talents creates an enlightened persona of your brand. In social, you want to determine and create valuable opportunities to leverage your employees as experts or ambassadors.

Leveraging Your Staff

A good place to start is with the early adopters within the company. Who already has a Twitter account? Who is constantly on Facebook, or sharing on Delicious? Since these people are already using the tools, find out what they like to talk about and see how you can best leverage their expertise and passion.

If you are working with marketers that are accustomed to the traditions and skill of "outbound" marketing, you probably need to help develop their inbound marketing or social media skills. They may need more direction on how to approach this new way of communication. In many cases marketers are used to yelling, and less used to listening. This is where training becomes critical. Everyone can be an evangelist, but many may need guidance along the way. We will talk in more detail about this in Part 6 of this guide.



You should also think about team members with extensive product or service knowledge. No matter what their function is internally, you need to leverage people that really know the inner-workings of the company, and have the relationship skills needed to learn quickly, and adapt. The big pictures goals of the company need to be focused on at all times.

Hiring New Staff

If you're part of the 8% of companies that plan to hire social media specific positions over the next year, consider Hubspot's "DARC" technique for hiring. DARC which stands for Digital citizens, with Analytic chops, that have web Reach, or are Content creators is an effective starting point to help you look for the right qualities in new employees. If you are trying to build a social presence, why not hire people with a social presence? But, most importantly, your people need to have passion, they need to love what they do, and because they love what they do so much, they are great at sharing their expertise and experience.

Using Agencies and Consultants

Many companies use Advertising or PR agencies to help strategize and manage some of their marketing communications. You should definitely keep them in the loop, so they can also be aware of red flags that might pop up. If you plan to outsource your social media team completely, or give some responsibility to an agency or consultant, it's important to remember while they might be "part" of your team, they are not working within your company and they do not know as much as you do about your products, services or the inner workings that take place on a daily basis.

Agencies are good at providing training wheels, but the communication and outreach needs to be genuine and it needs to come directly from someone at your company, and there needs to be a high level of transparency with all social media communications.

How Social Are Your New Hires?

- Do they have a blog?
- Are they influential in the blogosphere?
- Do they love to create content?
- Are they analytical?



Part Four: Rules & Policies

When developing your governance policy remember that it doesn't need to be complex. Depending on the size of your organization, the number of rules and regulations may vary, but remember that in the end you want your employees to express themselves as individuals, while representing the brand, but representing their uniqueness and expertise first.

You don't have to create your policy from scratch: many companies have already written governance policies, and in the name of good transparency have posted them online for anyone to download and use. If you do download one, I suggest customizing it to speak directly to your team. You may want to create separate policies for each social medium since different conduct is expected within each of these social realms.

For example, your behavior on Facebook is more casual and personal than it would be on LinkedIn. So while there needs to be standard rules of engagement, you should section out each social channel your company is using or plans to use, then set guidelines, or tips for each.



Sample Governance Policy

1. **Transparency is crucial.** You should say you work for Company X, use your real name, and your role here. Honesty goes a long way in this space: it is permitted and encouraged.
2. **Don't be misleading.** Never represent yourself, or your company in a misleading way. All claims must be true and substantiated.
3. **Relevance is king.** Post meaningful, respectful content and comments offering insight, no spam, and no remarks that are off topic or offensive.
4. **Use common sense.** It is best to ask permission to publish or report on conversations that are meant to be private or internal to the company. Don't violate the company's privacy, confidentiality, or legal guidelines for external commercial speech.
5. **Be an expert.** Stick to what you know, feel free to provide individual perspectives on non-confidential activities, as well as news and information that can be of value to the audience.
6. **Disagreements.** When you disagree with someone, always remain polite and respectful. If you are in a situation you think may become antagonistic, do not abruptly disengage or become offensive. Ask advice from the marketing manager and/ or politely disengage yourself from the conversation.
7. **Competition.** It is okay to write about competition but it is mandatory to behave diplomatically, write factually, and have the appropriate permissions.
8. **Legalities.** Do not comment on anything related to the legal matters, litigation or parties that the company may be in litigation.
9. **Crisis control.** Do not participate in social media if the topic being discussed may be a crisis situation. Even anonymous comments can be tracked back to the company's IP address. Refer all social media activity around crisis to the marketing manager, or whoever is running social media.
10. **Be smart.** Protect yourself, your privacy and the company's confidential information. What's published is widely accessible, so be thoughtful and consider content carefully.

Sample Policies for Social Sites

Here are some examples of “guidelines” that may be incorporated into your governance policies specific to type of social content. Again, I would also include best practices and any other information they might need—passwords, URLs, resources, etc:

For Blogging

- Post valuable content with relevant photos
- Be consistent with posting days and times—readers have expectations
- Note and link to sources
- Social media should be integrated to each post
- Conversation should take place
- Be responsive to readers
- Thank people for participation
- Encourage interactivity and diversity of content: videos, quick posts, features, various topics

For LinkedIn

- Find & connect with people you know
- Personalize your URL and add profile address to your email signature
- Connect with relevant people
- Fill out your entire profile and link to the company website
- Use keywords in your profile and make your profile public
- Recommend people you’ve worked with and get recommendations
- Update your status regularly
- Join relevant user groups and contribute news and answer questions

For Twitter

- Have an easy ID—i.e. your name, be transparent
- Find relevant people to follow, monitor @ replies and respond
- Learn the Lingo: [tweet] to send a message [DM] to send a direct message [@] to reference another user [RT] = re-tweet
- Ad Twitter ID to email signatures
- Be active, committed, engaged
- Notice who is following you, promote others, thank followers, and share information
- Consider SEO; links, words & phrases, sell your content



Part Five: Roles & Responsibilities

One thing to always think about is that your customers are not looking at your company as a collection of many different departments. To them you are just one company with one persona, and because of this fact, it's important that you are one team, and are represented that way online. Customers and prospects just want their problems or concerns addressed efficiently and effectively; they don't really care if you're customer support or marketing. Here are three things that everyone should be doing:

Listening & Monitoring

Everyone needs access to whatever listening or monitoring tools you have decided to implement. There should be regular reporting and sharing of information so it's accessible to everyone, including the people that aren't participating regularly, they should still know what's going on. When listening, it's important to consider who, what, where, when and why. Obviously you want to know who is talking about you; customers, influencers, competitors, etc. And what are they saying? Is it good or bad? what's the general sentiment? Where are these conversations happening because you'll want to be there too. Are these conversations event, product or content driven? When are people talking about you? And finally, why are people talking about you? In this case you'll need to take a step beyond listening and simply ask them why. Here is where go from listening to engaging.

Educating & Evangelizing

Educating and evangelizing is for both your customers but also your fellow employees. If you've created a social media team, then they are going to be responsible not only for educating the rest of the company on the social media efforts and results, but also to inspire and evangelize the benefits of social media. Your team might start small, but over time that teams needs to recruit more members and that's done by getting everyone excited about what you're doing, how it effects them directly, and what they can do to help the cause. It's important to keep focused on the business causes,



and how it gives everyone greater opportunity to be successful at their job. When it comes to educating and evangelizing for your customers, it has little to do with selling. This is where you develop content, or engage in conversations that will lead to greater success for your customers or prospects. Social media is all about education, and sharing expertise and knowledge, it is not about charging for information. It's about embracing the transparent nature of the medium.

Departmental Participation

Here are a few specific ways each department can participate:

Marketing

- If someone inquires, respond
- If complimented, say thank you. If you get complaints, apologize
- If someone needs help, point them to the right person.
- Connect with pr, bloggers, journalists, publishers then build relationships

Sales & BD

- More education needed here, social media isn't for selling
- Should be listening for leads - point of need, kudos, demo requests, etc.
- Connecting with prospects or customers after demos, etc.
- Respond to inquiries working w/ marketing or community managers

Customer Service

- Most critical is to empower this team to solve problems in real time
- Set comprehensive guidelines for customer calls
- Listen and respond to troubleshooting or technical product related issues, complaints or billing questions—to be re-routed to accounting

Product Dev

- Create user forums to get feedback
- Run beta tests with community members and advocate
- Respond to feature suggestions or requests and troubleshoot with the community
- Innovate with community
- Respond to feedback from community manager

Executives

- Blog, share business experiences
- Be the company's consciousness
- Don't sell, but educate and share
- Inspire other leaders, and employees
- Show your passion constantly

Part Six: Training

Education & Support

One thing about social media leaders is their ability to inspire and captivate their audience with passion and excitement. It's very easy to get people to see the value when you are passionate about something. A good thing to do is to set up separate learning sessions for each department that you plan to leverage for social media. To start, get marketing together to build / review the plan. Then maybe conduct separate trainings for your sales and support teams. Again, since each group has different objectives, each training will be slightly different.

Collaboration & Communication

Communication is key to success with social media. You need to have a process in place to share opportunities with each other. You will need some way to pass comments, tweets, etc. How can / will you provide the right information at the right time for them to use / share?

Tools & Content

In order to have a successful socially armed team, you'll need to provide tools, mainly a listening platform. There are a number of tools you can use for listening, some paid and some free. If you chose to use free tools, you will most likely need more than one. Paid tools can make things easier since all the tracking, forwarding and collaboration is usually done within the one interface, but they be costly—some charging by search queries, some by the seat. It's important everyone has access to listening tools, but collaboration and communication tools are very helpful as well. Internal social tools or wikis can be used to communicate with team members and share information across departments.

Topics to Cover

Sales teams

- Overview of social media and business, what are the best practices
- Review the governance policy
- Discuss collaboration and communication between teams
- Discuss how to connect with prospects or clients, and how Sales can support awareness efforts
- Introduce tools, and resources to be provided i.e. content (frequency)
- Discuss what marketing is doing (strategy) to help drive awareness

Customer support teams

- Overview of social media and best practices
- Review the governance policy
- Discuss collaboration and communication between teams
- Discuss how—to troubleshoot online, and proactively problem solve
- Talk about how to get customers on board with social - kudos, etc.
- Introduce supporting customer evangelism, testimonials

Social Listening & Tracking Tools



Radian6

This is a paid listening service. A flexible dashboard that enables monitoring all kinds of social media with real-time results. Helps you to identify influencers, measure engagement, and determine which conversations are having an impact online.



Meltwater Buzz

This is also a paid social media monitoring tool to monitor blogs, social networks, forums, etc for brand monitoring and tracking. Enables sentiment tracking, geographical monitoring and keywords.



SocialCast

This is a great paid for enterprise collaboration tool that connects your company's data, people and resources in real-time, much like how Facebook updates. It makes information management and collaboration easier through; micro-blogs, activity streams, groups, calendars, employee profiles, etc.



Salesforce Chatter

For those of you using Salesforce.com here is a great addition to support Sales and Marketing alignment. Chatter (beta testing now) promises to help you connect and share in real-time by way of live feeds, micro-blogs, groups, employee profiles.



Google alerts

Google alerts are free email alert updates of the latest relevant Google search results for web, and news based on your choice of keywords, or topics. You can choose to receive alerts daily, weekly, or as it happens.

Note: In order to get everyone engaged in the conversation, you'll need to make sure that you have enough content for everyone to share. Your team can leverage this content to start or contribute to conversations. You need to decide how you will share the content with you team, and supply them with the links, and other relevant information they might need to support the content they plan to share.



Twitter Search

Twitter search (search.twitter.com) is free, and allows you to search keywords or hash tags in real-time and get a live feed of status updates. You can also search by location.



Hootsuite

Is my favorite free Twitter client. It let's you monitor your brand and other searches, schedule tweets, integrates with other social networks, lets you tract statistics and enables team workflow so you can manage multiple accounts, and multiple users.



SocialText

Has some paid and some free versions of its tools. Like the collaboration tools above, social text incorporates micro-blogging, wiki workspaces, blogs, groups and social networking to improve and enable enterprise collaboration.



gURLs

Genius URLs are an easy way to track your social media conversations back to revenue. By using these shortened urls in your tweets, blog posts, and facebook fan pages, you can see the engagement history of people once they convert from anonymous to known visitors or prospects on your site.

Part Seven: Measurement

How will you measure success? Since each group within the team has different objectives, you'll want to measure success differently. Here are some potential KPIs for you and your team. While ROI is important, you'll notice that things like engagement and influence become as important, especially for long-term growth.

Reach

- number of connections per social channel
- number of facebook friends and fans
- blog traffic and subscribers
- number of twitter followers
- number of followers from influencers

Influence

- how much is content shared to a relevance audience
- number of referrals, re-tweets, brand mentions, conversations
- number of pings, links, trackbacks, user generated content, endorsements, etc.

Engagement

- the health of community—actions taken, number of community members linked to each other
- number of webinar, white-paper, newsletter signups, content contributions or comments
- time spent on site or fan page, frequency to blog
- anonymous users to member conversion

Conversion

- anonymous to known website visitors
- community members that become clients
- general referrals from community manager to appropriate sales person or executive

Reputation

- reputation management
- brand sentiment
- growth of awareness
- growing conversation
- more positive mentions
- Retention - are customers engaged? Attending webinars?
- Customer support
- FAQs answered

Are You Ready?

Like they say for everything else, your social media strategy and success will be based on your goals, and it's not a one-size-fits-all method for communication and relationship building. This is really meant to get those thoughts following and help you begin to organize your team and strategy.

An important thing to remember is that social media is not a trend, it's a paradigm shift in the relationship between brands and their consumers. Whether it's B2B or B2C the fundamental ideas don't change. Provide value, and build a relationship through genuine engagement and care. It is still new to most companies, so if you are just getting started, you are not alone, and there are plenty of resources out there to help you navigate through this new "social" world.

Social media is a way to get everyone talking, and becoming more engaged, even if it's just internally. But, remember it's a powerful opportunity for your brand to solidify relationships that account for more revenue in the long run, whether its through a decrease in cost of support inquires or more leads in your sales funnel, the value of social media is proven more and more everyday.



About the Author

About: Barbra Gago, Social Marketing Manager

Barbra Gago is the Inbound & Social Marketing Manager for Genius.com. Before joining Genius she consulted with small businesses on their opportunities online through community development and leveraging social media tools to drive awareness, traffic and revenue.

At Genius.com she works relentlessly to craft successful inbound strategies, support and build the Connected Marketer community, and write passionately about the things she learns.



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