

Maintaining an Online Presence

Maintaining an Online Presence

Business Management of a Digital Presence

JULIA GRAV

CAMOSUN COLLEGE
VICTORIA, BRITISH COLUMBIA



Maintaining an Online Presence Copyright © 2022 by Camosun College is licensed under a Creative Commons Attribution 4.0 International License, except where otherwise noted.

Contents

Land Acknowledgement	vii
Acknowledgements	viii
Introduction	1
<i>Image Description</i>	2
What is an Online Presence?	
1.1 Problem-Solving Approach to Design	11
<i>Communication as Solution</i>	14
1.2 Online Privacy	17
1.3 Online Privacy Decisions	28
1.4 Case Study: The Cost of a Poor Online Presence	35
Professional Branding	
2.1 Design Patterns	41
<i>C.R.A.P Design Principles</i>	42
2.2 Image formats	48
2.3 Using Design Thinking in Graphic Design	53
Creation	

Website Design

3.1 KEY CONCEPT: Content Strategy	61
<i>Search Intent</i>	62
<i>Website Header Space</i>	65
3.2 What is a website?	68
3.3 Website Design Interface and Patterns	73
3.4 Content Audits	78

Social Media Management and Marketing

4.1 Build a Community	85
4.2 Owned, Paid and Earned Marketing	89
4.3 Policies & Terms of Use	93
4.4 Key Performance Indicators	99
4.5 Meta	101
4.6 LinkedIn	111
4.8 Social Media Integration	113

Land Acknowledgement

Maintaining an Online Presence is a collaboration of faculty and students at Camosun College in Victoria, B.C. Camosun campuses are located on the traditional lands of the Lekwungen and WSÁNEĆ peoples. We acknowledge with respect that we do our research, writing, learning, and teaching on the traditional territories of the Lekwungen People, the Songhees, Esquimalt, and WSÁNEĆ peoples whose historical relationship to these lands continue to this day. We also acknowledge our responsibility to seek and learn from opportunities for truth telling and reconciliation, and the need to engage in the ongoing work of decolonizing our campus communities both inside and outside the classroom.

When we position ourselves in space and time we make it known that we have been here on these lands and we are a part of them.

Acknowledgements

This book is a collaboration between Camosun College's School of Business faculty and students. Special thanks goes to editor and past-ABT 270 student, April Gavora!

Introduction

Creating consistent design elements across web platforms is at the heart of maintaining an online presence. Every business, not-for-profit, and volunteer organization requires intentional designers to think across website and social media channels. The ability to communicate clearly and effectively in written, verbal, visual, and interpersonal contexts is vital for the success and advancement of maintaining an online presence.

This textbook will take you through these stages from planning, development, and implementation to completion. Part 1 focuses on defining an online presence as well as discusses some of the privacy and security implications that exist for businesses online. Design development is discussed in part 2, where professional branding meets design thinking. Using content to drive layout and human-centred design strategy, part 3 of this textbook addresses key ideas in website design. Finally, best practices for integrating a business brand and creating community in the social media landscape are discussed in part 4.

A potential customer will often have their first experience with your online presence. If it is not communicated clearly and promoted effectively to the right audience, it will not become a reality. Moving a design from concept to completion involves many stages (see **Figure 1**), most of which require clear communication and effective design skills.



Figure 1 *The process of designing and maintaining an online*

Maintaining an Online Presence introduces the key elements of digital privacy, branding, website creation, collaboration, and research skills needed to communicate an effective look and feel for a variety of purposes and audiences.

Image Description

Figure 1 image detailed description:

Maintaining an Online Presence goes through 4 stages in the design process.

1. Pre-design Planning
 - Design requirements: identify needs, goals, and objectives.
 - Define one-liner: create context and do research.
 - Determine digital privacy consideration.
2. Design Development
 - Propose a project (hypothetical or actual).
 - Develop branding materials.
 - Critique and perform market research on similar websites.
 - Create a website content wireframe.
 - Determine key messaging.
3. Design Implementation
 - Write website content.
 - Create website.

- Re-evaluate website content and design (on-going).
- Write a social media marketing plan.

4. Design Completion

- Determine needs for lead-generation.
- Perform an analysis of project file management.
- On-going website maintenance needs.
- Share brand/design on social media.

[Image to Figure 1]

“Building an online presence as a business, creative, professional, or contractor is a process more than a result. You’ll never feel like your presence is “done” or “perfect” because not only are online tools and platforms evolving constantly, but your brand will also go through changes over time. Just like we as humans improve, change, and grow, so will your online presence, messaging, values, design, and systems. Instead of feeling driven for perfection, feel driven for clarity and be open to (and hopefully even excited about) the idea of constant improvement.”

— Belle White, Founder @ Belle White Creative¹

1. Belle White Creative. (n.d.) Strategic copy and content to grow your business. <https://www.bellewhite.ca/>

WHAT IS AN ONLINE PRESENCE?

Chapter 1 Learning Objectives

This chapter will help you:

1. Understand what an online presence is, why it is important, and what it looks like.
2. Recognize the main features of an online presence.
3. Apply a “problem-solving” approach to communications tasks, starting by learning how to fully discover, empathize, and define the problem before looking for solutions.
4. Understand the importance of online privacy.
5. Appreciate the complexity and iterative nature of maintaining an online presence.
6. Apply content ownership licensing to online content.
7. Determine online security choices for maintaining an online presence.

When you hear the term “online presence,” what comes to mind? Perhaps you think of a brand, copy writing, a social media channel, or business website. And you are correct. However, an online presence is much more than that: Creating

an intention around the communication style and “look and feel” of a brand is at the heart of creating and maintaining a business’s online presence.

It also includes determining a privacy officer, how and what type of content must be produced, attention to file management, and image creation/sourcing. Furthermore, this involves deciding which platforms and channels the brand will use for communication, and ensuring authentic engagement in these spaces.

We might then define maintaining an online presence as using various modes of communication (design, written, and visual) within a business’s voice to connect customers with the solutions to their problems that the organization offers.

Why is Creating and Maintaining an Online Presence Important?

An online presence is often the first point of contact for customers to engage with your business. If the design and communication is clear (informing, instructing, and persuading), then it will build awareness, trust, and value for an organization (brand).

An online presence can be considered through the creation and maintenance of design systems and content, such as:

- Creating a marketing one-liner
- Technical privacy policy documents
- Documentation of project scope (i.e., a website development plan)
- Development of branding materials (i.e., logo, header images, photos of staff, etc.)

- Sketching a content wireframe for a website
- Writing and reviewing website content
- Creating a website designed with accessibility and usable design patterns
- Planning social media marketing
- Lead generation
- Sharing on social media

Thus, it is loosely a “designed” form of marketing communication that requires practitioners to have a heightened awareness of design standards (rules and expectations), technical know-how, and rhetorical situations (audience, purpose, and context) in which they are communicating.

This textbook aims to provide you with that heightened awareness in design communication. It introduces the basic conventions of design communication and trains you to adopt a **reader- and human-centred approach**. This approach is key for developing online content that effectively communicates your business brand to your target audience and achieves the desired results.

What Does an Online Presence Look Like?

An online presence exists in many forms, depending on the purpose and intended audience. Consider the following example of a one-liner, also known as a business elevator pitch, excerpted from the book *Marketing Made Simple* by Donald Miller. What can you tell about the intended audience?

A sample business one-liner:

"Many families struggle to spend time together, but at Acorn Family Camp time stands still and families create connections that last a lifetime."(Miller, D. 2020)¹

This one-liner describes a problem that is solved by the business Acorn Family Camp. In addition, it is short, creates a story-loop and makes people curious about the business.

Exercise 1.1: Creating a One-liner

Reflect on the example one-liner above in relation to your experience as a customer or as a business owner. What examples of an effective business one-liner (elevator pitch) that evoke a brand's core purpose and brings the customer into the conversation, can you recollect?

Write a paragraph about a business that solves a specific problem. The solution should result in curiosity, emotional-connection, and action. For example, you might write about effectiveness of Patagonia's Core

1. Miller, D. (2022). Marketing Made Simple. A Step-by-Step StoryBrand Guide for Any Business. HarperCollins Leadership

Values in their marketing literature in relation to climate justice and action. Consider the business's target audience when choosing how to write this. **Then write a one-liner for your (hypothetical) business.**

1.1 Problem-Solving Approach to Design

Business communications tasks are often designed to solve a problem or improve a situation. Design thinking processes are often enlisted to get to the true heart of the problem. A clearly-articulated design process provides a clear, step-by-step plan for finding the best solution for your situation.

Take a moment to search the Internet for the term “design thinking process” and look at “images.” You will find many variations. Have a look at several of them and see if you can find a common pattern.

One commonality you will likely find in the images is this: the first step in designing any solution is to fully *Discover* the problem. **Figure 1.1.1** shows a typical design thinking process, from discovery to innovation. Think about the kind of communication and interaction with customers that each step of this process might entail for a business.

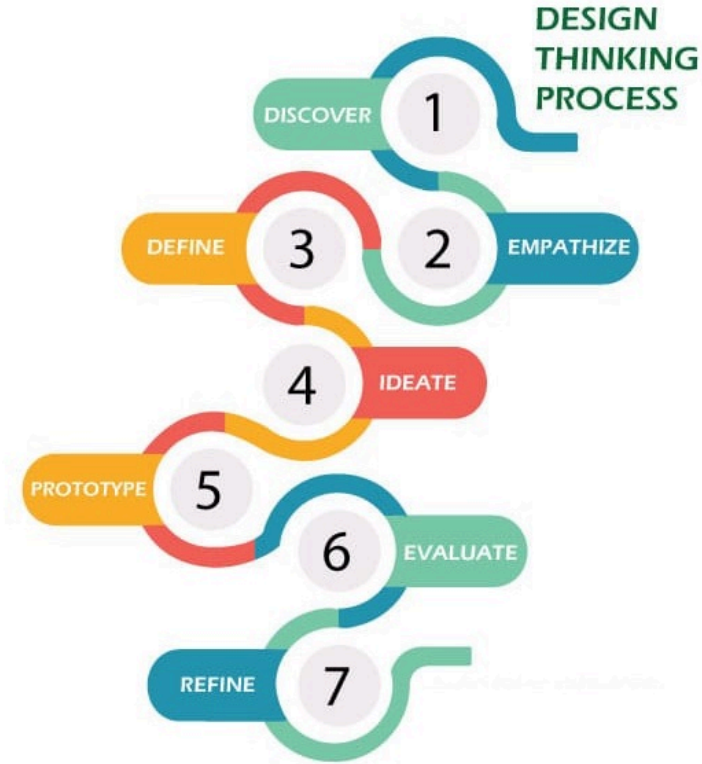


Figure 1.1.1 Design Thinking Process Diagram.¹

Design thinking encourages multiple perspectives and variations at the heart of the issue: You think about solutions to customers problems until you have a clear empathetic understanding of the problem. This critical first stage of the design process requires investigation, beyond your initial assumptions. Creating this empathetic relationship to the problem allows for deeper understanding; however it cannot be done alone.

1. Mvtestani, CC BY-SA 4.0, via Wikimedia Commons

For our purposes, we will use Barry Hyman's Problem Formulation model² to clearly define a problem. Hyman's Problem Formulation model consists of 4 elements:

1. **Need Statement:** recognizes and describes the need for a solution or improvement to an "unsatisfactory situation." It answers the questions, "what is wrong with the way things are currently? What is unsatisfactory about it? What negative effects does this situation cause?" You may need to do research and supply data to quantify the negative effects.
2. **Goal Statement:** describes what the improved situation would look like once a solution has been implemented. The goal statement defines the scope of your search for a solution. At this point, do **not** describe your solution, only the goal that *any* proposed solution should achieve. The broader you make your goal, the more numerous and varied your solutions can be; a narrowly focused goal limits the number and variety of possible solutions.
3. **Objectives:** define measurable, specific outcomes that any feasible solution **should** optimize (aspects you can use to "grade" the effectiveness of the solution). Objectives provide you with ways to quantifiably measure **how well** any solution will solve the problem; ideally, they will allow you to compare multiple solutions and figure out which one is most effective (which one gets the highest score on meeting the objectives?).
4. **Constraints:** define the limits that any feasible solution **must** adhere to in order to be acceptable (pass/fail conditions, range limits, etc.). The key word here is **must** —

2. B. Hyman, "Ch. 2: Problem formulation," in *Fundamentals of Engineering Design*, Upper Saddle River, NJ: Prentice Hall, 2002, pp. 40-54.

constraints are the “go/no go” conditions that determine whether a solution is acceptable or not. These often include budget and time limits, as well as legal, safety and other regulatory requirements.

Communication as Solution

This model can apply to a communications task as well as more physical design tasks. Imagine your communications task as something that will solve a problem or improve a situation for a target customer. Reflect back to the one-liner, what visual elements would be required to communicate the solution?

- **Understand the Need:** consider the *discovery* and *empathy* phases of the design thinking process. Does the target audience lack sufficient information, time or money? What is the unsatisfactory situation that needs to be remedied by the business? What specifically is unsatisfactory about it?
 - *A potential client lacks sufficient information on whether the solution I have proposed to solve the client's problem will be feasible, affordable, and effective.*
- **Establish a Goal:** *define* the business' purpose. What do you want your customer to do, think, or know? Do you want your customer to make a decision? Will the business change opinions or behaviours? Follow a course of action? What is the desired outcome? And what form and style of communication will best lead to that outcome? For example:
 - *Provide the customer with visuals showing you understand their needs and have a solution. Keep the information specific, appealing and in a readable*

format so it makes the business purpose an ideal solution for the problem.

- **Define Objectives:** consider the specifics of your message and your target audience to determine what criteria you should meet. What form should it take? What content and design elements will you need to include? What kind of research will be required? What information does your audience want/need? What do they already know?
 - *Perform market research and a design critique to investigate what similar businesses are doing to meet the objectives.*
- **Identify Constraints:** where are your customers most likely to engage? Consider your rhetorical situation. What conditions exist that present barriers or challenges to communication? How can you address them? For example,
 - How much time is your target audience willing to give you? How long should you make your reel, one-liner, or website header.
 - What format and style do they expect?
 - How much time do you have to create it?

Businesses looking to clarify their message and truly determine their unique selling position (USP) should start with communication and delving into the discovery stage with their customers. A simple example of this is a Net Promoter Survey used by businesses like Quickbooks to ask a simple question: “On a scale of 0 to 10, how likely are you to recommend Quickbooks to your friends or colleagues?” Followed by an open-ended question asking the customer to define the chosen value. This type of question allows Quickbooks to perform both qualitative and quantitative analysis on their services.

When businesses ask for feedback from customers surprising

information can be found. Perspectives and use-cases can be found on issues and problems the business didn't know existed. Balsamiq, a website wireframe builder, harnesses the power of discover by empowering their customer service team.³

Essentially, businesses that communicate regularly with their current customers are more likely to be able to determine their target audience and ensure their products and services are meeting *real* needs.

3. [Smashing Community]. (2022, May 24). User Research in the Real Messy World with Billy and Jessica at The Meets For What? May 2022. [Video]. YouTube. <https://youtu.be/418IsX2BN5k>

1.2 Online Privacy

When was the last time you were asked to “Accept Cookies”? Probably today. The tracking of our digital lives through cookies, web analytics, social media platforms and employer apps is multiplying day-by-day. What are cookies, anyway? (Keep reading to find the answer!)

Privacy is a “hot-topic” that spans the realms of both our physical and digital lives; it is also incredibly complex and multifaceted. You may find it down-right elusive. This is often because what one person considers private information, another may willingly share with a large circle of friends or even strangers; particularly on social media.



Photo by Glen Carrie on Unsplash

While digital information-sharing provides countless opportunities for community-building, collaboration and education, the broad disclosure of personal information can have potentially damaging effects. At the very least, indiscriminate personal information-sharing may increase the circulation of email spam. More seriously, comprehensive exchanges of information may cause some individuals loss of critical health, employment, educational, or financial benefits. At its most damaging, publication of personal information on the Internet can, and has, stigmatized vulnerable individuals, tarnished or destroyed reputations, terminated careers and even caused some people the loss of their jobs, family or identity.

In British Columbia, there are two primary information privacy laws: the Freedom of Information and Protection of Privacy Act (FIPPA) and the Personal Information Protection Act (PIPA). These laws set out the minimum standards that employers, employees and service providers (including College instructors) must follow to prevent unreasonable, unnecessary or unsafe sharing of personal information belonging to staff, clients, customers and the general public. BC has some of the strongest personal privacy laws in Canada and arguably one of the best in the world, alongside Great Britain, Australia and New Zealand.

Clearly, protecting privacy is a serious issue and should be considered carefully by individuals, groups and organizations planning to use digital technology with the capacity for widespread distribution or storage of personal information. With this in mind, governments across Canada over the last decade have introduced and revised information privacy laws to ensure enhanced protection of personal information.

Knowing why privacy is important and how to protect yourself are the best possible tools for preventing privacy breaches. As Edward Snowden puts it: “Without privacy you don’t have anything for yourself.”

Specifically in the context of maintaining an online presence, there are two main privacy concerns: **“transactional” privacy** and **content ownership** business owners must consider.

Transactional Privacy

“Transactional” privacy is the privacy of meta data that identifies individuals or their computers (e.g. IP addresses) and what they access online, when, for how long and with whom. Meta data refers to data that is captured through information

exchanges when a user is browsing the internet, including any tab or window that is open, logged into an online application, submitting a form, purchasing a product, etc. In our context, we are purely interested in electronic transactional data that is financial, logistical, or time-measurable, which can pertain to certain individuals whether that person has consented to the distribution and aggregation of their data, or not. This type of information is typically kept in cookies that are requested and downloaded from websites onto your computer then shared with websites or web apps that you visit. In order to protect your privacy, it is best to **Manage Cookie options every opportunity you get!** For those sites, where there are many multiple aggressive ads

A few examples of this are:

1. Netflix remembers where you last stopped watching a particular show/movie.
2. Amazon remembers what you had in your cart the last time you logged in.
3. Facebook remembers your login information so that you don't need to login in every time you visit the website.



Photo by Luke Chesser on Unsplash

When a particular site has Google Analytics installed a lot of information is shared with a website host. For example: an individual's MAC (media access control) address, IP (internet protocol) address, any information Google can ascertain from your Google profile (when you are logged in or have saved login information on a particular site), etc.

We must all decide what personally identifiable data applications and servers can access while we are browsing the

Internet. And we can do this either intentionally or passively. For example, creating alias email accounts to sign up for new services, rather than using your main everyday email address. In addition, enabling a cookie notification extension on your browser to block websites with questionable tracking tactics.

Particular attention needs to be paid if you are using a software application that is hosted and managed in the US. Firms in the US buy digital information for sale at auctions. Large multinational organizations such as Google, Meta, which owns Facebook, Instagram and WhatsApp, SnapChat, FourSquare and Twitter are all based in the US. These companies broker and auction transactional information to advertisers to help strategically control their respective markets.

As we move through the social media component of this course, you will learn more about how much businesses know about customers to target advertisements. When you use social media or many other website services (e.g. WordPress.com), you consent to the terms and conditions of a privacy policy for that given company. In some cases, you will be asked to click a checkbox agreeing that you have read the conditions outlining how that specific company will (or won't) protect your privacy. This 'privacy through policy' system leaves users vulnerable as many people do not take the time to read through the conditions and simply click *agree*. This can lead to the sale of personal information by companies, often without a user's awareness.

Read Terms of Service; Didn't Read¹ to see how individuals' rights are being affected by the top online web applications through the storing and sharing of transactional data. Yes, Google, YouTube and Facebook are all listed.

1. ToS;DR. Terms of Service. Didn't Read. <https://tosdr.org/>

Content Ownership

Content ownership is concerned with the privacy of an individual's words, views, opinions, images, relationships, exchanges or reviews online.

TABLE 1.1.1 Types of online privacy

Source	Transactional	Content
Static Website (no database capabilities)		Content is copyrighted by author/business, unless otherwise stated. (i.e. wikicommons)
Dynamic Website	Cookies, Web Analytics	Content is copyrighted by author/business, unless otherwise stated. (i.e. ToS;DR)
Facebook & Instagram (Meta Inc.)	Cookies, usage data tracked, data shared with third-parties under “terms of service”	Content is copyrighted by creator, however, owned by Meta Inc.
GMail, Google Drive, Docs (Alphabet Inc.)	Usage data tracked	Content is copyrighted and owned by creator
Employer tracking apps	GPS (location), screen captures, check-in/out, attendance, etc.	How content is copyrighted depends on an employees contract.

By default, copyright is provided to the author(s) or organization of the documents creator, according to the laws of the country from which they operate. Some companies such as Meta, apply their own licensing onto the content published on their site. This is agreed to in the Terms of Service when users create their accounts.

In the case of Facebook and many other similar platforms, they do not grant themselves full property rights over your content, but they do claim royalty-free redistribution rights and they

are absolved of any copyright infringement claims that might occur from others copying your content from them.

Copyright

Copyright is provided, by default, as soon as a work is created. It provides security and protection for an original literary, musical, dramatical or artistic work. The author has the right to prevent others from reproducing or copying the work. A work is by default copyrighted once it has been created and fixed in material form. (Canadian Intellectual Property Office, n.d.)²

Students at Camosun College, for example, should follow the Copyright guide for Camosun College students. Paying particular attention to the idea of fair dealing

Fair Dealing

In fact, fair dealing is applicable for everyone according to the Copyright Act 8 purposes. The Fair Dealing Decision Tool, created by the Councils of Ministers of Education can help you determine if you are able to adapt or copy another's work

The Supreme Court of Canada outlined **six factors** to help determine if a particular use (or "dealing") of a copyright-protected work is fair:

2. Canadian Intellectual Property Office. (n.d.). A guide to copyright. https://www.ic.gc.ca/eic/site/cipointernet-internetopic.nsf/eng/h_wr02281.html

1. Purpose

- Is the use one of the eight purposes permitted under fair dealing (education, research, private study, criticism, review, news reporting, parody, or satire)? If so, it is more likely to be considered fair.

2. Character

- How is the work being used? Is the work being widely distributed?
- If a single copy is used for a permitted purpose, it is more likely to be considered fair.

3. Amount

- How much of the work is being copied?
- If the amount copied is trivial, the use is more likely to be considered fair. However, it may be possible to deal fairly with an entire work. For example, there may be no other way to criticize or review a photograph or research journal article, unless the whole work is copied.

4. Nature of the work

- Was the work previously published?
- If the work is unpublished or confidential, the use is less likely to be considered fair. However, a court of law may also consider whether the copy serves a public interest.

5. Available alternative

- Is there a suitable alternative to the work that is not protected by copyright? If so, the use is less likely to be

considered fair.

6. Effect

- Is the copy likely to compete with the market of the original? If so, the use is less likely to be considered fair.

Note: A use does not need to satisfy all of these factors to be considered fair.

Copied and adapted from Copyright for Students from Langara College under a Creative Commons Attribution-ShareAlike 4.0 International License.

Licensing

Many types of licensing exist for all digital mediums that allow the copying and reproduction of an original work of writing or art. For example, in BC, educators *can* use the Fair Dealings Policy³ to upload and create copies of up to 10% of a copyright-protected work for their courses.

Creative Commons

“Our licenses enable collaboration, growth, and generosity in a variety of media” (Creative Commons, n.d.)⁴

3. Camosun College. (2022, August 18). Copyright guide for Camosun College. <https://camosun.libguides.com/copyright>

4. Creative Commons. (n.d.) . Share your work. <https://creativecommons.org/share-your-work/>

Watch this excellent introductory video created by Creative Commons and licensed under CC Attribution-ShareAlike 4.0. While watching consider what you can share in this open community?



















One or more interactive elements has been excluded from this version of the text. You can view them online here: <https://pressbooks.bccampus.ca/onlinepresence/?p=27#oembed-1>

Made with Creative Commons: A book on open business models from Creative Commons on Vimeo.

Key words here are *accessible, equitable, usable* and *shareable*.

There are many ways sharing content can be good for business. Creative commons licenses all include attribution, take a look at Figure 1.2, a compatibility chart which references the licenses and their adaptability “remixing”.

Figure 1.2

	 PUBLIC DOMAIN	 PUBLIC DOMAIN	 BY	 BY SA	 BY NC	 BY NC SA	 BY NC SA	 BY NC SA
 PUBLIC DOMAIN	✓	✓	✓	✓	✓	✗	✓	✗
 PUBLIC DOMAIN	✓	✓	✓	✓	✓	✗	✓	✗
 BY	✓	✓	✓	✓	✓	✗	✓	✗
 BY SA	✓	✓	✓	✓	✗	✗	✗	✗
 BY NC	✓	✓	✓	✗	✓	✗	✓	✗
 BY NC SA	✗	✗	✗	✗	✗	✗	✗	✗
 BY NC SA	✓	✓	✓	✗	✓	✗	✓	✗
 BY NC SA	✗	✗	✗	✗	✗	✗	✗	✗

CC License Compatibility Chart / CC BY 4.0

Exercise 1.2: Content Licensing

Reflect on the use-cases for distributing content and media using Creative Commons licensing in a business environment. Read the article Beyond Copyright: the Ethics of Open Sharing by Josie Fraser⁵ paying close attention to the section: Recommendations for ethical, open practice.

Write a paragraph that outlines a digital access policy for your (hypothetical) business, one you might

- Fraser, J. (5 November, 2021). Beyond copyright; the ethics of open sharing. <https://medium.com/creative-commons-we-like-to-share/beyond-copyright-the-ethics-of-open-sharing-a495bb95569d>

consider using in your course project. The business can be similar to a type of business you have worked-in previously or in a field you have expertise/interest. Write about the type of licenses that will be used to share or restrict the sharing of content created by the business. Consider the business' employees as the audience when choosing how to write this. Include sufficient justification for your policy.

Media Attributions

- There is no privacy on Facebook
- CC_License_Compatibility_Chart © Creative Commons is licensed under a CC BY (Attribution) license

1.3 Online Privacy Decisions

With more and more accounts and online transactions becoming part of daily life, managing who has access and who can see your data has become a seemingly arduous task.

An online presence consists of accounts on systems using various services, requiring the use of multiple passwords and an understanding of the implications of shared content (and metadata around that content). Initial security choices that you make when building and managing a business or your personal online presence can have long lasting implications for your brand and personal integrity, far into the future.

Below you will be introduced to some best practices and some tools people and businesses use to make security compliance more manageable. For example, password managers are helpful for keeping track of all your passwords.

The following tips should be considered for every computer that you use, whether at home, work or school. Tablets and mobile devices can also have security software installed for free, for example, Avast¹.

Securing Your Device

Ensure that every device you use is secure. The best way to do this is to download security updates to your OS (Windows or

1. Avast Software. (n.d.) More than free antivirus. <https://www.avast.com/>

Mac) as soon as they are available. Malwarebytes is an free add-on to make sure your device is regularly scanned for viruses.

Turn on the cookie notification function or session cookies in your web browser settings. Cookies can be used for data-mining, marketing, and tracking your interactions online. See Google's tips for enabling, clearing, and managing cookies² in Chrome.

Vary your IP address by turning off your modem when you are finished with the Internet for the day. Search providers and other services you access online can see your IP address. As you may know, every computer uses one unique IP address to connect to the Internet, but turning off your modem and reconnecting changes that IP address to a new one each time.

Furthermore, enable 2-factor identification on as many web-apps as possible. And never open email attachments if you are not sure what they contain and/or who they are from.

Use Search Engines and Web Browsers Wisely

Turn on your web browser's "clear history" and "clear cookie" functions so the record of sites you visited and cookies you accept are automatically deleted once you log off. If you are using a public (or school) computer, activate the *erase history* function in the browser settings before you log off.

Configure your work and home web browser to protect your

2. Croft, Patti. (2022, July 28). How To Clear Cookies On Your Google Chrome Browser. <https://allaboutcookies.org/how-to-clear-cookies-chrome>

personal information. In the “set-up”, “preferences” and “options” menus, where your personal information is requested, use a pseudonym instead of your real name, and an alternate email address. It is usually a good idea to create an email address that you use for signing up for new web services, rather than using your personal or work email. For this pseudonym email account don’t provide any additional personal information beyond what is required to set-up the email address.

Never enter sensitive personal information, such as telephone or social insurance numbers or other identifying financial or health information as search terms or into online forums. They may be linked by service providers with other aspects of your identity or captured by hackers or identity thieves.

Consider exploring and using search engines that do not to collect any personal information at all, such as DuckDuckGo³ and StartPage⁴ (previously known as the metasearch engine *ixquick*).

Email and Instant Messaging

Don’t reply to spammers even to say “remove me from your list.” That only confirms for them that your email is active and you will probably receive more spam from them. Also the “unsubscribe” options they provide can be a trap as well, so ignore them.

All email and instant messaging (IM) programs have archiving capabilities. Pressing the delete button may delete the

3. DuckDuckGo. (n.d.) <https://duckduckgo.com/>

4. StartPage. (n.d.) <https://www.startpage.com/>

message from your view and prevent your retrieval of it, but the messages are still retrievable by the service provider. In fact, some IM programs automatically save your chats unless you proactively select otherwise. Look for features on your IM service that allow you to prevent the recording or archiving of your conversations. Remember, though, that email in particular is virtually always saved on backup servers.

Select Good Passwords and Create Algorithms to Use Them Effectively

- Develop strong (complex) and varied (multiple) passwords for your programs and functions and never write them down at work.
- Use nonsensical (except to you, of course) combinations of letters, numbers and symbols for your passwords. The strongest passwords are typically the longest ones without many repeating characters.
- Think of a passphrase that is easy to remember such as, DogsGoBark and then vary it by including the service name and special characters.

Password Managers are very helpful to store and safely retrieve your passwords. On your home computer, or at work if you have administrative privileges, you can download and use either KeePass⁵ or Password Sentinel⁶, both free, trusted applications.

5. KeePass. (n.d.) KeePass Password Safe. <https://keepass.info/>

6. Password Sentinel. (n.d). <https://www.passwordsentinel.com/>

Choose Internet Applications, Services and Websites Carefully

Investigate new applications, services and websites before you use them. Choose ones with good reputations that have transparent privacy policies.

If you are uploading or creating content or images on third party websites, such as Picasa, Facebook and YouTube, the information is stored on their servers, so if the website, service or application is sold or goes bankrupt, the privacy and security of your information may change regardless of what the original service agreement or privacy policy says.

Consider that the best protection for your personal information is to not upload it in the first place or use pseudonyms, aliases and alternate/protected identities wherever possible. Be sure to read the user agreements, though; some hosts deny access to their services for users that provide false information, so be aware of the risks before taking them.

Read Privacy Policies and User Agreements

Yes, they are often long and boring but they are important. Pay particular attention to the part of the user agreement or privacy policy that explains how the service will collect, use, share and store your personal information, and who it says owns the information (including photographs and other images) uploaded or created while using the application, service or web site. It is typical for services to claim some form of access or control over your words and images, such as the right to share it with 3rd party clients, so be prudent and selective about what you think is reasonable or fair.

Look for a statement in the user agreement about cancellation of your account. Does the service allow total deletion or are you only able to “deactivate” your account? Does the agreement clarify what happens to your account information if you cancel?

Be suspicious of privacy policies that are hard to find, vague, or written in a way that is confusing. Privacy policies do not have to be long to be good, and they should be clear and accessible.

Look for a statement in the privacy policy about how or where to complain if you are unhappy about the collection, use, disclosure or storage of your information. There should be a process for complaining and a person who has authority for handling complaints about policies and breaches (i.e. a privacy officer).

Check to see if the host participates in a “privacy seal” program. Sites and services that do participate in privacy programs show some level of concern for users’ privacy, and the program may provide an alternative source of resolution for complaints. Some examples of reputable privacy seal programs are: Verisign⁷ and TrustArc⁸ (formerly *TRUSTe*). Privacy seals on their own, however, are not guarantees of privacy protection.

Look to see how the privacy policy or host states it will address or manage changes to its privacy policy. Will it notify you by email, announce changes prominently on its web site or just simply modify the policy? The way a host makes changes to its policy reflects its respect for the privacy principles of notice, knowledge and consent.

7. Verisign. (n.d.) Verisign enables the world to connect online with reliability and confidence - anytime, anywhere.

<https://www.verisign.com/>

8. TrustArc. (n.d.) <https://trustarc.com/>

Many of our everyday activities can significantly increase the chances of a security breach, but we don't always know that we are making these choices. For example, SpiderOak employees work in a zero-trust environment "where, by default, nobody is trusted either inside or outside of the infrastructure – eliminating inside threats, permission creep, and unintentional exposure." (SpiderOak, n.d)⁹

9. SpiderOak. (n.d.). About us. <https://spideroak.com/about/>

1.4 Case Study: The Cost of a Poor Online Presence

No one knows exactly how much poor branding and online communication costs business, industry and government each year, but estimates suggest billions. In fact, a recent estimate claims that the cost in the U.S. for poor communication alone are close to \$400 billion annually!¹ Poorly-worded or inefficient emails, websites that are misleading, social media posts that go unread due to poor design, hastily presented information, sloppy proofreading — all of these examples result in inevitable costs. The problem is that these costs aren't usually included on the corporate balance sheet at the end of each year; if they are not properly or clearly defined, the problems remain unsolved.

You may have seen the Project Management Tree Cartoon before (**Figure 1.4.1**); it has been used and adapted widely to illustrate the perils of poor communication during a project.

1. J. Bernoff, "Bad writing costs business billions," *Daily Beast*, Apr. 23, 2017 [Online]. Available: <https://www.thedailybeast.com/bad-writing-costs-businesses-billions?ref=scroll>

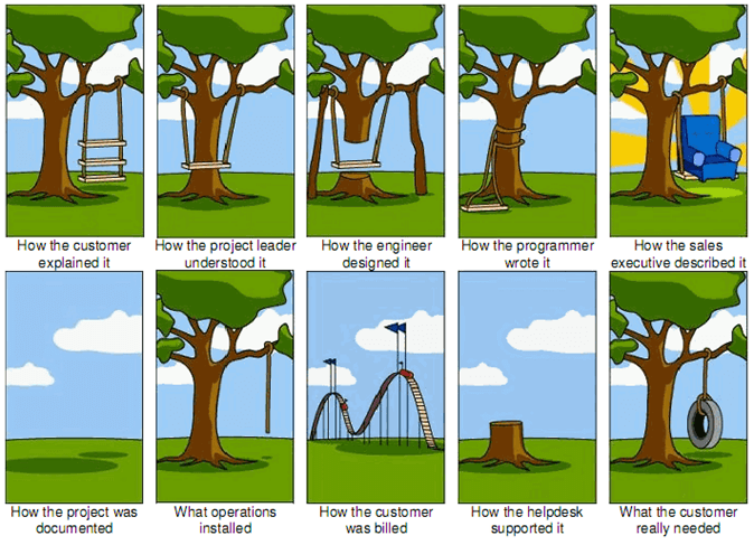


Figure 1.4.1 Project Management Tree Swing Cartoon.²

The waste caused by imprecisely worded website headers, confusing emails, posts that don't add value, ambiguously written contracts, and other examples of poor communication is not as easily identified as the losses caused by a bridge collapse or a flood. But the losses are just as real: measured in wasted time, work, money, and ultimately, business.

The following "case study" shows how a poor online presence can have real world costs and consequences. For example, consider Google+, which launched in 2011, following Facebook's prolific adoption. The site shut-down on April 2, 2019.

"Given the challenges in creating and maintaining a successful Google+ that meets our consumer users' expectations, we decided to sunset the consumer

2. J. Ward, "The project management tree swing cartoon, past and present," TamingData, July 8, 2019

version of Google+. We're committed to focusing on our enterprise efforts, and will be launching new features purpose-built for businesses. Read the announcement.” (Google. 2022)³.

Even before a data-breach of over 500,000 Google+ users' data was exposed by the Wall Street Journal,⁴ the platform was slated to be shut-down. A lack of engagement was at the heart of the decision. People did not tend to spend more than 5 seconds at a time on the social media app. While Google+ tried new layouts, it never really met the needs of its users, 73.3% of which identified as male⁵. Furthermore, 90% of users never posted anything on the platform. Without a “feed” or news-reel, the app did nothing help people connect and bring stories to life.

The issue was mainly the presence of the site was ambiguous. There was no clear communication strategy: No purpose or reason why people should interact in the space. At the time of shut-down, Google+ lost over 111 million users.



An interactive H5P element has been excluded from this version of the text. You can view it online

3. Google. (2022). Frequently asked questions about the Google+ shutdown. <https://support.google.com/googlecurrents/answer/9217723>
4. MacMillian, D. & McMillan, R. (2022, October 8). Google Exposed User Data, Feared Repercussions of Disclosing to Public. <https://www.wsj.com/articles/google-exposed-user-data-feared-repercussions-of-disclosing-to-public-1539017194>
5. Kasteler, J. (2016, May 30). Facts & Stats To Help You Determine If Your Business Should Use Google+. <https://www.searchenginepeople.com/blog/16051-google-plus-stats.html>

here:

*[https://pressbooks.bccampus.ca/
onlinepresence/?p=34#h5p-2](https://pressbooks.bccampus.ca/onlinepresence/?p=34#h5p-2)*

PROFESSIONAL BRANDING

In the previous chapter, we defined an online presence as the transaction of communication between a business and its customers (business to business, or business directly to people). In this chapter, we will look more deeply into what makes an effective brand, both technically and through case studies.

Chapter 2 Learning Objectives

1. Develop an understanding of the C.R.A.P. design **principles**
2. Bring an awareness of design-thinking into branding
3. Source and curate effective images for use on the web
4. Identify various web image formats and their purposes

A brand is way more than a logo or website. The company's feel and reputation are tightly connected to its branding.

Before continuing, complete the exercise below to help you understand how two different companies, that sell the same product, market their brand.

EXERCISE 2.1 Describe some differences between two very different brands, selling the same product

	Pit Viper ¹	Oakley ²
Purpose		
Audience		
One-liner		
Lead-generation		
Calls to Action		
Design Elements		
Effectiveness (out of 5)		

What key differences do you note between the two businesses? What do you think accounts for those differences?

1. Pit Viper. (n.d.). <https://ca.pitviper.com>

2. Oakley. (n.d.) Be who you are. <https://www.oakley.com/en-ca>

2.1 Design Patterns

Branding is creating a personification of a company with a distinct personality, style, attitude and culture. The persona should be relatable to the target audience (i.e. ideal customer). Creating a brand with authenticity is often touted as the chief focus for marketers when thinking of creating images, such as a logo, for a business.

Branding, then, ultimately becomes directly tied to the employees or staff members who maintain customer relations, marketing, communications and the visual integrity of the company.

Use these guidelines and ask yourself the following questions:

- **Who is my target audience?** Who is the company trying to reach? What are their primary, most primitive needs that this company meets? What actions do I want them to take? (Think of primitive needs such as time, money, reputation, etc.)
- **What are my customers' perspectives on this type of business topic?** What is my role and relationship to the potential customers?
- **What colours are associated with this type of business?** For example, blue represents calmness and peace vs. red which represents energy and passion¹

Getting a clear understanding of a target audience is important to be able to communicate a brand effectively. It also

1. Color Psychology. (n.d.) Color Psychology.
<https://www.colorpsychology.org>

enables you to imagine your audience as you design and re-design. Keep asking yourself whether the design is clear to your audience. How could it be better?

Creativity and freedom of design choices make designing often overwhelming for beginners. As you start out, it is helpful to know the rules and principles that effective designs use to capture attention and clearly communicate ideas.

C.R.A.P Design Principles

The following principles of design are described by Robin Williams in *The Non-Designer's Design Book* and summarized below. The term C.R.A.P is an easy-to-remember acronym that stands for Contrast, Repetition, Alignment, and Proximity.

Contrast

This principle states that contrast makes things easy to read and helps important things stand out. Think of black on white: It is easy to read, and there is no question as to why it is the default text colour. Creating contrast in designs makes your images and text pop-off the page. The image below shows how the best contrast (images on the left) comes from using lighter colours and opacity behind the text.



Figure 2.2

Alignment

This principle states that every elemental design choice should be made explicitly with a visual connection to other elements.

Aligning elements to the area of focus and ensuring padding and margins are aligned will significantly increase the legibility of content in a document or web page. Proper alignment also creates an aura of prestige around the design. Proper, consistent line spacing and use of **active "white space"** in design work are critical to a design's success. Active white space helps individual's eyes to be drawn to the most important elements of a design. In web design, proper use of active white space prevents cluttering of the screen and helps individuals focus on the main ideas being communicated.

A good example of this can be seen on the website CSS Grid Garden². Even though the background is not white, effective use of space between elements helps draw the eye to the various components on the page. Less clutter means the average individual will spend more time browsing the important content.

Repetition

This principle states that using the same shape elements or repetitive linking styles and fonts on a website creates consistency. Website menus, for example, have hyperlinks grouped together repeated with the same design (font, font size, font weight, ect.). This pattern helps you understand that these parts of the web page are links used to navigate the

2. Codepip. (n.d.) <https://cssgridgarden.com/>

site. In creating an effective website, Robin Patricia Williams believes repetition is the single most important principle of the four. (Williams, R., 2008)

Another good example of repetition is bullet lists. Each bullet represents another idea in the list.

Repetition in user interface (UI) design reinforces the context of your language or particular style. For example, the template used to design this textbook uses the same styles for Headings (font, size, boldness, alignment). This visually shows the structure of the document and helps to navigate the content.

In branding, repetitive lines or colour schemes are critical. Deciding on a shape or line angle and repeating it throughout your design will help a brand gain recognition. Name recognition will be enhanced, and the individual will come to see particular colours, shapes or fonts as a direct indicator of a brand's product/services. The image below shows consistent font, colour and style choices for a presentation.



Figure 3

Proximity

This principle states that *related* elements should be positioned closely together.

For example, a tag-line for a business typically comes directly underneath the logo or brand name. Another example would be address lines: the street number, street name, city, postal code and country should all be stacked one under the other for readability: You will not have to scan the entire design looking for pieces of related information.

In web design, proximity, like alignment, plays a very important role in the look and feel of your site. Intuitive themes and website layouts will be easy to read and scan. These will utilize

the two principles of alignment and proximity to the fullest extent. For example, ensuring that headings, which should be designed to be easily scanned, would be placed directly above paragraphs that provide more information about that heading.

We will use these principles throughout this course as you build your own project websites.

If you are interested in more of the psychology behind visual marketing and branding, I highly recommend reading the Piktochart article: 50 Visual Marketing Statistics For Today's Marketer³, by Iris Leung.

EXERCISE 2.2 Business Graphic Logo

A friend has asked you to review their new business logo. What revisions to contrast, alignment, repetition and proximity would you suggest?

Note: This logo was recreated from an outdated logo of a famous hotel chain, can you guess which?

3. Leung, I. (2021 December 6). 50 Visual Marketing Statistics For Today's Marketer. <https://piktochart.com/blog/visual-marketing-statistics/>



Media Attributions

- contrast
- repetition
- not-effective-design

2.2 Image formats

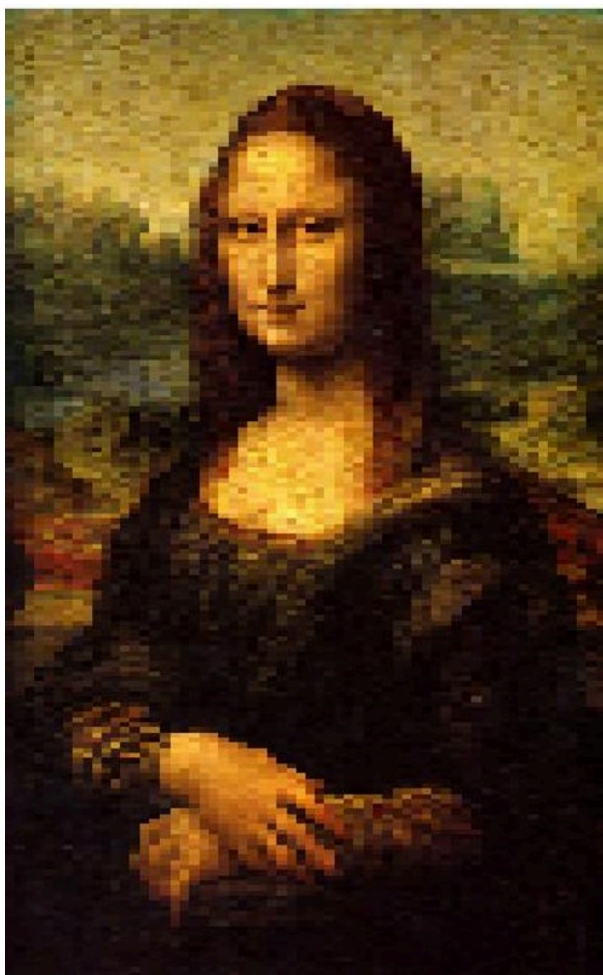
Using photographic images in your online presence requires considerable decision making. Beyond the image look at feel; the graphical elements and placement of the image must also be considered. After which, you need to decide where to source your images. Typically the choice is one of these three: stock (paid), public domain (free) or graphic/photographic (new) images.

In a business environment, images of current customers enjoying or using actual products and or services, is best. But in reality, photo-shoots are not always easy to set-up or capture – think of an accounting office. Before getting into which image to use when, let's discuss image formats.

Vector v. Raster (Pixel) Image Formats

At the heart of every image is its graphical compilation. Graphics are either made of tiny squares (pixels) or mathematical calculations (analytical and geometrical). The most important difference between vector and raster images is their scale-ability:

Since vector graphics are rendered using mathematical calculations they are able to be resized without the loss of definition on edges and lines. Raster images, on the other hand must be resized from the source application and re-exported in order to be resized. If not, they will be of lower quality, anti-alias and will look “pixelated”. Different applications are set-up to create either one or the other format. For example Adobe Illustrator creates vector graphics whereas Adobe Photoshop creates raster graphics.



"Pixelated" 300px width photograph of the portrait: "Mona Lisa"



Original 150px width photograph of the portrait: Mona Lisa

Originally, the raster image on the left was set to 150px width and then scaled-up to 300px width without going to a larger "pixel density" source file creating a "pixelated" effect. [Creative Commons CC0 License](#)

A number of popular image file formats are shown in the chart below:

Table 1: Vector and Raster Image File Formats					
Raster			Vector		
Encapsulated PostScript File (.esp)	Adobe Illustrator native file format (.ai) – not web-friendly	Scalable Vector Graphic (.svg)	Joint Photographic Experts Group (.jpg or .jpeg)	Portable Network Graphics (.png)	Graphical Interchange Format (.gif)
There are considerably more vector image formats than raster.			WebP Image (.webp)	Tagged Image File Format (.tiff)	Adobe Photoshop native file format (.psd) – not web-friendly

Scale-able Vector Graphic (SVG)

Just as described above, this file format is incredible in that it does not lose quality when scaled. The simplicity of the SVG allows for it to be programmed manually or created using web applications like Affinity Designer¹. You will most often find this file format in the shape of graphics, icons or logos. The graphic shown on the right is a SVG exported into a PNG file format in Adobe Illustrator.



Figure 4

1. Serif Ltd. (n.d.). Affinity Designer. <https://affinity.serif.com/en-us/designer/>

Joint Photographic Experts Group (JPEG or JPG)

This file format is best for photographs that have a full colour-palette. It is by far the most common and easily identifiable image file format. JPEG is 24-bit RGB (red green blue) format capable of millions of colours and colour transitions. It uses lossy compression when reduced in image size. Meaning some of the data of the image is lost in compression; which is clearly evidenced in the Mona Lisa painting above.

For best results, export your images as progressive JPGs. This will allow images to load faster through multiple passes when an individuals Internet throughput is low.

Portable Network Graphic (PNG)

This type of image is mostly suitable for graphics or images that do not have large colour palettes. **The 8-bit indexed colour option is the most suitable for the web because of its lossless compression and small file size.** PNGs are great for graphics because they also allow for transparencies which make them ideal for icons that you want to overlay on a web page.

There are several types of PNG images:

- 8-bit index colour: 256 pixels of colour resulting in very small file size
- 24-bit indexed colour: millions of colours like JPEG
- 48-bit indexed colour: high-quality image storage that results in very large image file sizes
- 16-bit grayscale: useful for image storage and not for publication on the web

Use the PNG image format when you are working with flat colours with hard edges and transparent areas.

Images in Context

As you'll read in Chapter 3. Website Design, content strategy and flow is all about making your message and content relevant to your target audience. Same goes for image selection on social media sites. Images should always add value to the content (copy) surrounding it. For example, if you are building a website for car rentals, show an image of the specific car directly next to the car make, model and description.

Images should be cropped and resized to ensure they do not take more than 3 seconds to load. The smaller the pixel-size of the image the faster it will load on the page. Ensure your images are less than 1MB in file size to meet that 3 seconds mark.



An interactive H5P element has been excluded from this version of the text. You can view it online

here:

<https://pressbooks.bccampus.ca/onlinepresence/?p=49#h5p-1>

Media Attributions

- Mona_Lisa

2.3 Using Design Thinking in Graphic Design Creation

Now let's circle back to Design Thinking and apply the process to graphic design. Using this framework can help us conceptualize the flow of effective graphic design through communication.

Clients often have ideas of what colours or layouts they prefer. They gain this knowledge through market research, simply knowing their competitors, or through a critique of similar business' digital media or personal preference. Clients, however, are not their customers so it is also important to bring the customer perspective to the conversation. It is imperative that designers (YOU!) spend sufficient time on the discovery and empathize steps of the design thinking process.

Below is the Design Thinking process image, inserted again for your reference:



Figure 5

Let's consider moving through the design of a graphic logo using design thinking in the the following context. Use the questions provided to spark discussion (with clients) and movement through this reiterative process.

EXERCISE 2.3 Using Design Thinking when working with clients

You are working with an owner of a bakery who is looking for someone to re-brand their logo and web site. Some important questions to ask would be the following.

Note: Each step below has the client source feedback from existing customers.

Discovery

- What has sparked this change at this **time**?
- What are the **implications** of the design change – is the business changing names?
- What is the **status** of the contract with the previous graphic/web designer?
- When customers think about this (type of) business, what images come to mind? Ask their actual customers!

Empathize

- What are the **feelings** the new design should invoke? (calmness, passion, harmony, etc.)
- Are their specific colours or feelings that the design should avoid?
- What does the client think are effective components of design?
- What are customers hoping to feel when they think of this (type of) business?

Define

- **Where** will the design elements be promoted/ placed?
- With the client, establish a **list of designs** (in the same field) that resemble the desired “look and feel”.
- Ask if the client feels comfortable having some of their **customers analyze the list of designs** for effectiveness. What works and what doesn't?
- With the client generate the **overall scope of the contract** with deadlines, deliverable and indications ownership of the work after the contract is completed. Then sign this document as a contract.

Ideate

This is where the main design work comes in, with all the data and communication you have gathered from the client and their customers you should create 2 to 3 graphic designs for their consideration.

Prototype

This is where you show all designs to the client and, if possible, customers asking for feedback on the following:

- What “works” in the designs presented?
- Where do you see room for improvement?
- How do you think your customers would respond to this new design change?

Evaluate (Reflection)

Taking into consideration the feedback you have

received from the client (and customer), what changes will you make to the designs? Which design was most well received by the client/customer?

Refine

Take the graphic you have created, and the feedback you received, your reflections on the evaluation, and refine it. Make as many or as few changes as you think are required. The design is ultimately your work.

However, making at least one change recommended by the client will lead to a more successful adoption of your graphic logo.

Design Thinking emphasizes reiteration. Once a design is finalized various sizes and image formats may be required. Small tweaks made to the styles are also common. For example, take a look at the Camosun's extensive Brand Guidelines¹.

Media Attributions

- DesignThinkingProcess

1. Camosun. (n.d.). About Camosun Brand and Logo Guidelines.
<https://legacy.camosun.ca/about/brand/>

WEBSITE DESIGN

A business website is the ultimate method a business maintains their online presence. It is where the business owns its content, layout, design and reputation. No matter how brilliant or important social media channels are to a brand, reputation is most often measured by the content and feelings evoked from their website. This section includes the information on how content writers, UX (user experience) and front-end designers optimize websites.

Chapter 3 Learning Objectives

This chapter covers the following topics:

3.1 Content Strategy Understand the importance of researching human-centred design through content search intent and calls to action.

3.2 What is a Website, anyway? Learn about the various components and integration tools that comprise a modern-day website.

3.3 Website Interface & Design Patterns Understand the best-practices around user design experience.

3.4 Content Audits Maintaining content and ensuring search engine optimization.

3.1 KEY CONCEPT:

Content Strategy

When creating a website, content strategy is a necessary first step. What will the website say? All websites have a specific audience so finding out about what your audience needs, wants and expects from the business is the key to its success. This means web content, as well as design, must be human-centred.

When we build content with a specific strategy for success it also meets search intent, a key component of search engine optimization. Writing effective content focuses on the **readability** or **usability** so that the target audience is more likely to get the message you want them to receive, and your website is more likely to achieve its intended purpose.

Donal Miller and Dr. J.J. Patterson identify some key things to **avoid** in their book “Marketing Made Simple”:

- “You are using too much insider language
- You are using too many words in the heading
- The call to action buttons use passive language
- The call to action buttons are not repeated down the page
- The images do not relate to the product or back up the words you’re using on the page
- The language is cute or clever but not clear
- The site does not promote a lead generator
- You’re using a slideshow so the text changes too fast a frustrates potential customers
- The site tells *your* story rather than inviting customers *into* a story.” (Miller, D. & Peterson, J., 2020)¹

A website should clearly indicate the “problem” the business is trying to solve. This includes what happens when the problem is solved, by using or purchasing the service/product and **most importantly** how to go about purchasing it.

Designing a website is like designing anything: it requires a clear purpose. Understanding your target audience, writing content and choosing design features that will best achieve your purpose. In essence, you must understand the **flow** of content and how you can most effectively convey the desired message to that audience.

Search Intent

Interviewing existing customers helps copywriters and business owners better understand what content is expected on the site. Without a direct link to the company’s main stakeholders, the customer, and copy editors may miss the purpose as seen by the audience. If the business is new and there are no “users” to interview, then considerable market research should be completed. What are businesses in the same field doing well, where is their space for excelling and differentiating?

While there will probably be many different types of customers, the main target audience is what the content should be directed towards. Finding this data and separating it into themes is often cost prohibitive, both in-terms of time and money. There is an alternative though, and that is through the use of search intent analysis through search data. Google is the

1. Miller, D. & Peterson, J. (2020) *Marketing Made Simple*. HarperCollins Leadership.

king of search engines with more than 90% of the market share worldwide.

Google's 4 Types of Search Intent

Google uses search intent categories to design its Search Engine Results Pages (SERPs). When researching which terms and categories you should emphasize on a business website, make sure to note that some searches may fall under multiple categories.

This taxonomy was developed by Andrei Broder, back in 2002 when they were the vice president of research at AltaVista.²

The categories are summarized below by Rebekah Baggs & Chris Corak, from the book: SEO for Everyone

"Informational. The user wants to learn about a topic. Informational searches might look like:

- "is life insurance tax deductible"
- "how long do running shoes last"
- "income tax brackets"
- "fender jaguar vs jazzmaster"

Transactional. The user wants to take action – to make a purchase, say, or download a product manual.

Transactional search intent is not always tied to buying something. Transactional searches might look like:

2. <https://www.cis.upenn.edu/~nenkova/Courses/cis430/p3-broder.pdf>

- “life insurance quotes”
- “fugazi in on the kill taker on vinyl”
- “RACI chart template”

Navigational. With this kind of search, someone wants to go to a specific website or find a specific page (perhaps one they’ve visited before). There’s typically only one destination the searcher is trying to get to. Navigational searches look like:

- “amazon.com”
- “powell books”
- “healthline keo diet”

Google has more recently added:

“Visit-in-person. These searches have local, real-world intent; someone is seeking an in-person experience or a brick-and-mortar interaction. Visit-in-person searches look like:

- “Thai restaurants open now”
- “movie times”
- “barber shops”
- “discount tires near me”³

Using a search engine can provide you with lots of great content ideas. Break the results into content topics; and don’t forget to go back to the initial search result in Google to see related search queries.

Website Header Space

When someone lands on your website for the first time they first need to determine if they have found the site they were expecting. Having your business name and logo front and centre on your website is a must. Below that the next item of content should be a very short description of what the business does; what services or products they offer, ideally in 5-words or less. This is the main sub-heading.

The main sub-heading is undoubtedly the most important content piece on your website. It ensures users that they are on the right site and that you have the solution for a deep-seeded problem of not enough money, time, status, etc. Do not be overly specific with the main sub-heading: Ensure the broad scope of services and products are included while also indicating how it will solve a real problem in the customers life.

EXERCISE 3.1 Write Main Headings

Using a business you are familiar with, or one you have worked for before, use Google search to help you identify common content themes for the business and/ or type-of-business. Use local search results, if relevant. Write a main heading that uses some of the key themes you identified from non-Ads on the SERPs

For example. with the search “Web Design Victoria, B.C” some of the resulting themes are:

- Shopify, independent, WordPress, flexible, free

consultation, hourly rate

A relevant main website heading related to these themes, that is not overly narrow, could be:

Hassle-free web design services for Victoria businesses.

Call to Action

Many business websites fail to clearly define how you can purchase their product or service. The solution: have multiple “call-to-action” buttons throughout the site, specifically on the top-right menu or under the main sub-heading. For example: “Book a free consultation” is a great way to funnel leads to your inbox.

Make your target audience part of your story

When writing content for a website it is important to bring the customer into the story. For example, at SupaDesign we know you are the type of customer who wants to be seen and heard. Your voice matters and will be emphasized throughout the design process. When you position your customers at the heart of the business and show them that you truly understand the problem you are solving for them, you will get much better conversions on your content.

Use Testimonials & Stats to Build Authority

Using testimonials on your site helps build reputation and authority. Interview your customers, or draft a testimonial of a conversation or sentiment they have expressed from you for their approval. Having at least 3 testimonials on your website helps build authority but also shows the humanistic-side of the business.

Statistics have the effect of giving fast authority. For example, 100+ satisfied customers, \$100,000s of dollars saved. Even adding the number of years you have been in business will add authority to the content.

3.2 What is a website?

The foundational languages used to create the front-end design of a website are **HyperText Markup Language (HTML)**, and **Cascading Style Sheets (CSS)**. Take a moment to explore the code that is generating this web page by right-clicking on it, and choosing **Inspect (Element)**. You will see the code, styles, image sources and all the data that is being rendered by the browser. The image below shows the basic building blocks of a website.



Figure 4 – Many languages and files can be used to put together a website. HTML and CSS are always parsed and rendered in a browser.

What is HTML & CSS?

Each web page on a website is a unique HTML file. This file

contains the content (text and file paths to images stored on the server) that you see on the page. The styles and design of how this content is presented are created in the language CSS. CSS can either be linked to the HTML page from an external CSS file (most efficient), or by having the CSS code contained within each HTML page itself.

Note Knowing HTML and CSS allows you to customize your web pages. They are very powerful yet basic coding languages. Useful definitions, references, and tutorials can be available at W3Schools¹, freeCodeCamp² and Codepip³.

Content Management Systems

Most modern websites are built using a Content Management System (CMS). You have probably heard of at least one of these many popular options: WordPress, Joomla, Wix, Weebly, Squarespace, Shopify, etc. A CMS is an application used to edit and manage a website's content, using a user-friendly Graphical User Interface (GUI) rather than requiring the direct editing of code.

A CMS, like WordPress:

- Provides the background architecture to ensure database and server-side functionality.
- Maintains and updates the system architecture.
- Gives many template options that are easy to utilize and install.

1. Refsnes Data. (n.d.) Learn to Code. <https://www.w3schools.com/>

2. freeCodeCamp. (n.d.). Learn to code. <https://www.freecodecamp.org/>

3. Codepip. (n.d.). Learn to code by playing games. <https://codepip.com/>

- Allows the focus on content and imagery rather than coding.
- Creates the site navigation elements.
- Supports database integration.
- makes content indexed and searchable.
- ...and much more

Website verses Blog

Here are a few key differences between a blog and a website. For the purposes of this course we will be focusing on designing an effective website for a business, not a lifestyle blog.

- The term blog is an abbreviation for *web log*
- Blogs often contain an ongoing collection of time-based posts, presented in chronological order
- Blogs are often, but not always, written in a journal-style commentary
- A website usually contains informational pages, but can also have a blog section

Purpose of a Blog

Blogs can be used to:

- Drive traffic to your website
- Convert that traffic into leads or sales
- Establish authority on a topic
- Create community
- Be creative & have fun
- Follow your passion about a particular activity or topic!

What is WordPress?

WordPress is one of the most popular CMS. According to W3Techs 43% of all websites are built using WordPress. Being an open source platform means that anyone can contribute themes or plugins, help validate code and contribute to the system update. When making a site using plain HTML, each new page must be created manually. A CMS like WordPress simplifies the process of creating and adding content and images to your website.

WordPress.com vs. WordPress.org

There are two options versions of WordPress:

WordPress.com and WordPress.org. In both you can install and utilize 1000s of plugins to add features to your site.

The main differences between the two are explained below:

WordPress.com

- The default URL is `yoursite.wordpress.com` (hosting & domain maintenance by WordPress.com). There are paid options to add your own customized domain name.
- Limited access to the CSS and HTML code of your site for customization
- Themes are included but you cannot upload your own theme or use plugins
- Offers different plans, including free, with added features & upgrades

WordPress.org

- By default you use a custom domain for your URL

(yoursite.com) without the WordPress sub-domain

- You are in charge of site maintenance, including customizing your CSS and HTML and database support
- Requires web development knowledge (PHP, HTML, CSS, JS)
- More theme options available to use and the ability to upload your own themes and modify templates.
- Full control over theme files and settings

Media Attributions

- Components of a website: HTML, CSS, PHP, JS © Julia Grav

3.3 Website Design Interface and Patterns

Smart Interface Design

Websites should be unique, content-driven and show a clear business purpose. Coming up with a new solution for design issues can be very time consuming. Smart design patterns allow us to ask the right questions of our website layout to ensure maximum cross-cultural usability.

The guidelines below have been curated through usability sessions, design iterations and A/B testing. Before we dive into patterns, we want our website to be usable by all and that starts with adhering to website accessibility standards.

Website Accessibility Standards

An Introduction to Web Accessibility¹ outlines patterns you must implement when designing a website to make sure the site works for everyone.

Review the Tips for Getting Started² and pay close attention to the requirement for alternative text on media, as it is a requirement for all images that are non-decorative. A

1. W3C. (n.d.). Introduction to Web Accessibility. <https://www.w3.org/WAI/fundamentals/accessibility-intro>
2. W3C. (n.d.). Designing for Web Accessibility. <https://www.w3.org/WAI/tips/designing/>

decorative image does not add value to the content and is seen more as a placeholder on the site to ensure consistent flow of the page layout.

Layout patterns

Navigation

Besides being consistently stylized across all pages on your website, your navigation should also have the following features:

- Customizing the style of your navigation can dramatically make your website more user-friendly. **Add a “home” button/link and set the logo as a link which returns home.** On the left-most side of your menu, people will usually look for a way to get back to your homepage. This link is often called “home”, is the businesses logo or the name of the business.
- **Navigation items look like a button/link.** All links in your navigation should look like a link rather than plain text. WordPress.com will stylize your navigation to stand-out, however, using a specific colour pallet will ensure that your navigation links/buttons have sufficient contrast and “pop” when compared to the content on the rest of the page, is a must.
- **Add a hover effect.** People often read the web by moving their cursor over the content. When they go to click on a navigation link with their cursor, as opposed to tapping with a finger/thumb, the link is expected to change to indicate that you will be taken to another page.

Active White Space

Are there any glaringly large empty spaces on your pages? Are any of the images touching directly next to text? If so you need to think about “white” space on your page. For example, images should usually have some margin around them to prevent text from touching the side.

Active white space is used to create eye-catching space between components on your web page to make them easy to read and aesthetically appealing.

Too much white space leaves the layout looking plain and empty. Placing a decorative image in that space may enhance the layout and a non-decorative image may add value to the content.

Form layout

Every business website should have a contact form to make it easy for individuals to contact the business.

Forms are tricky but there are a few key patterns to follow:

- For complex forms, not typically of contact forms, break down the form into *tasks* (i.e. name and personal details, then order of relevant information)
- Put the tasks in a sensible order and use verbs to describe them (i.e. Shipping information)
- Tell users what they need before they start (i.e. documents, time)
- Make the submit button large enough and close enough to the form that it is easy to find.

Strategy, Usability and Style

In the article *How To Evaluate A Websites Design?*³, Hardingham pays particular attention to the Strategy, Usability and Style, which are relevant to knowing if your website is effective, or not.

Past Student Examples

These two websites were built by previous students in the course ABT 270 – Maintaining an Online Presence. They graciously agreed to share their exemplary work:

- <https://katieconacherphotography.wordpress.com>
- <https://ciaerialstudios.wordpress.com/>

EXERCISE 3.4 Which of the following two items in the list below are NOT accessibility issues?

1. Text is yellow on white.
2. Specific HTML elements are used to semantically define content.
3. Text is set to 12pt.
4. Images contain header text.

3. Hardingham, A. (2020 August 31). *How to evaluate a websites design?*.
<https://www.rivmedia.co.uk/how-to-evaluate-a-websites-design/8486>

5. A decorative image does not have alternative text.

3.4 Content Audits

Visual elements such as graphs, charts, logos, photographs, diagrams, and maps capture your audience's attention and help them to understand the brand more fully. They are important parts of content. Ensuring that visual elements and content are relevant and contextually important is an essential part of a content audit.

Auditing content and imagery greatly enhances your site's search-ability. Some of these tasks include:

- conducting search intent research (again)
- researching the effectiveness of content & navigation links
- editing content to include more phrases or keywords that people are looking for in reference to your type of business
- writing/optimizing meta descriptions and titles

Google Search Console

Once you have had some organic site traffic to your site, you will want to analyze to connect it to Google Search Console¹. This free, easy to use and set-up web application is an essential tool for auditing content. It helps you find out why people are coming to your site, from where and for what purpose. It is critical to understanding your sites search performance.

This tool shows only organic site traffic, not paid traffic through Google Ads, as well as insights on how google is indexing your

1. Google. (n.d.). Improve your performance on Google Search.
<https://search.google.com/search-console/about>

website. Here you will find the literal search terms people are using to get to your website. Are the terms identified relevant to what you expect? What group of customers/clients are not showing up on your site?

In the results section of Google Search Console you can download search results into a spreadsheet.

This type of data determines how transparent and helpful your site is for individuals looking for your product/service.

User research

Connecting with real people who use your site is a must if you want to better understand whether your content is meeting their needs. These are your target audience and customers. Finding out *how* they get to the website, *how* they work through the pages and what they think is missing are all keys to helping you revamp and continue to build new content.

Competitive Analysis

A lot can be learned about your businesses competition on Google Search Engine Results Pages (SERPs), especially if you plan on competing only locally within your community. You probably already know who shows up and how on local search result pages for your business type. Knowing this and harnessing it are two different things. Tools like Moz² and

2. Moz, Inc. (n.d.). There's a smarter way to do SEO. <https://moz.com/>

Ahrefs³ take keyword and competitor analysis to the next level by comparing results of your website and others.

Specifically, look for gaps in content between your site and your (local) competitors and what people are looking for online. What problems are they solving and what kind of user experience do their websites provide?

From there, identify content gaps through themes, sections, and individual pages from your competitive analysis. The content feature in Ahrefs can also help identify overlaps between your sites and others as well as gaps in content coverage.

SEO

While a lot of this section is showing you how to modify content for search-ability, there are still a few more tasks you need to complete to ensure your content audit meets all the SEO needs.

Rebekah Baggs & Chris Corak in *SEO for Everyone* identify these three essential overarching questions to ask of your content:

1. **Does the content include on-page optimization?** Are the headings and content related, are non-decorative images provided with alternative text, does the author meta tag have appropriate authority?
2. **Does the content satisfy search intent?** Does your content speak about the major themes found in search

3. Ahrefs Pte. Ltd. (n.d.). Everything you need to rank higher & get more traffic. <https://ahrefs.com/>

results related to your products, services, topics, etc.

3. **Is the content optimized for SERP display?** The title and description of each page should be unique and informative. To see the code, verbatim on any website, *right-click > view source* and look for the HTML meta tags are the top of the HTML document provided by the browser.⁴

4. Baggs, R. & Corak, C. (2021). SEO for everyone. A Book Apart

SOCIAL MEDIA MANAGEMENT AND MARKETING

In today's digital landscape, establishing and nurturing an online business *presence* goes beyond mere existence—it's about fostering a vibrant community through strategic social media marketing. This dynamic field, constantly evolving and defying traditional norms, demands thoughtful planning and genuine engagement across major platforms. While I won't delve into the step-by-step specifics for each platform here, let's explore the broader strategies for authentic participation.

Learning Objectives

This section contains the following chapters with the following learning objectives:

4.1 Build a community: Understand why social media is so important for businesses and how to show-up, authentically.

4.2 Owned, Paid and Earned Marketing: Understand the different ways content can be marketed on social media platforms.

4.3 Policies & Terms of Use: Develop strategies for creating internal policy documents around social media use.

4.4 Key Performance Indicators (KPIs): Develop SMART goals and use metrics to determine if the goals are met.

4.5 Meta: Understand best-practices around the use of Instagram & Facebook social media platforms.

4.6 LinkedIn: A use-case for businesses to show up and engage on LinkedIn.

4.7 Social Media Integration: How best to integrate your website and social media channels.

4.1 Build a Community

Fans help harness and promote a business in a way that is more authentic and genuine than any possible top-down social media (SM) campaign. By connecting and working to build a community on specific SM platforms you can build support the promotion of products/services.

Who is your audience? What is your purpose as a business? How can you help your audience succeed? Create a community on a social media platform by considering:

- Who is your primary audience? Who else might read this SM post?
- What is the best format to use to present this content (video, photos, graphics, etc.)?
- What specific outcomes do you want your social media marketing efforts to achieve? What do you want your readers to do, think, or decide after reading it?

Consistently maintaining a brand's identity and creating real relationships through SM is a powerful way to gain customer trust and support online. A business also needs to find out *who* exactly is in their audience (i.e. who is currently buying their products/services and investigate *why*). And where, on SM, they are showing up. Facebook? Instagram? TikTok? Snapchat? Twitter?, etc. Once you find out where your audience is participating, *ask* (potential) customers how the business can better serve them.

People who are already customers are usually more than willing to provide feedback on SM. It is best to be clear and consistent when requesting feedback. Not all suggestions can be implemented but should be taken into consideration. It

is also important to remember that people who are not avid users of a product/service will be reluctant to rate or provide answers to survey questions. Brands should only request this information from individuals who are already engaged or have purchased the service/product.

A business' audience is first and foremost their customers. On SM, marketers and strategists often get caught up in the number of followers, likes, and data trackers. These metrics are important but do not completely represent *customers*. Customers are the people that decide to buy your product/service. A short quick question about how likely a client would be to refer a product/brand to another, is a good start, and then asking for feedback on what should be done better so that they would give an endorsement to others.

Personal branding

Unless you're famous or a professional speaker, a business' *brand* is normally separate from your own identity. That's not to say that the content you create and the messages you deliver internally and externally through all mediums (email, memos, blogs, social media posts, etc.) of your business should not show a consistent personality and be unique. Hugh Culver's blog post "Show your personality"¹ emphasizes how modern marketers need to stop hiding behind their brands and show that there are real people at the helm of all levels of the business.

Collaborating with like-minded businesses can help create fun

1. Culver, H. (n.d.). Show your personality. <https://hughculver.com/show-your-personality/>

and spontaneous messaging that do not, at first glance, seem like campaigns.

Example

Local Victoria social marketing strategist and photographer Jared VanderMeer² uses his collaborations to enhance his brand and promote Canadian businesses. Working with Heather Pace, Jared created a reel in Instagram³ that showcases his impressive photography skills and Heather's delicious chocolate!

Consistent messaging

All members of a team, that have access to a company's SM accounts, be given a document that outlines not only what accounts the company manages but also parameters around engaging with each SM community. See Blood Services Canada's clear set of Social Media Community Guidelines.

Often these guidelines are published online so that customers and staff have similar expectations around rules of engagement. They are commonly referred to as Social Media Community Guidelines. You will typically find information regarding rules of engagement, such as when the company will delete posts rather than replying, working hours for when

2. [jared_vandermeer]. (n.d.) https://www.instagram.com/jared_vandermeer/

3. [jared_vandermeer]. (2022, May 6). Holding up the stack. <https://www.instagram.com/reel/CdOz5lKJTxE/>

you should expect an answer from a business, whether the business responds to messages from individuals, etc.

Consistent messaging shows leadership and authority in your industry and audiences. SM marketers who genuinely understand their company's brand, mission, vision and most importantly the *why* behind the business are best able to answer questions effectively and engage with their online audience in authentic and meaningful ways.

Do the RIGHT thing – Be a better human

When we're jumping through hoops to get Instagram followers or to keep people's eyes on content, what are we losing in the process? Always think: What is the reason you are posting? What are the intentions behind posting? Am I potentially harming anyone in the process? Is this (post) a reflection of my values/characters? If you struggle to answer any of these questions, then don't post. Your caption is an extension of the business and your audience will be impacted by what you post. Remember, behind every screen name is a person with feelings, interests, and needs. So, let's keep building those meaningful connections!

4.2 Owned, Paid and Earned Marketing

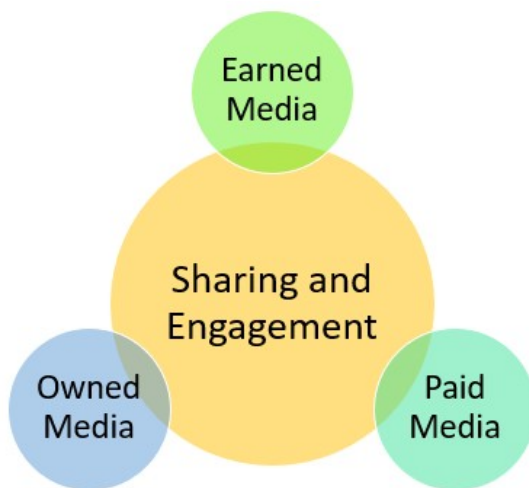


Figure 5 – Digital Media Trifecta: Earned, Owned and Paid Media

Planning for success

Everyone plans to succeed in online marketing: create a few good blogs, a website, social media accounts and then sit back and relax, right? Well, no. It is not enough to have the **owned** media (the website, accounts, SM, landing pages, etc.). You also need a clear plan for **paid** marketing and an idea of how to harness **earned** media.

A comprehensive marketing plan acts as the sieve through which all content, social media platform choices, and key

stories run. With prior planning of messaging and story, content creates cohesion and clarity for a customer. But before we get to creating a social plan, let's take a look at two campaign routes that both need to be taken into consideration in every successful marketing plan.

Paid marketing campaigns

Most social media platforms are set up to allow businesses to purchase advertisements. The campaign typically works by utilizing a pay-per-click (PPC) model: Choose the demographic, interests, and likes of target customers and pay each time your add is clicked/tapped-on. A brand should target within 2-4% of the broader market to get the most return on their advertising efforts. Paid advertising can drive traffic to your channels or website (i.e., through Google Ad words) and this can create measurable conversions (getting visitors to buy/connect). This method typically gives immediate results, and by setting the maximum amount you are willing to spend for each click, you can get a realistic bid and budget that is right for your organization.

For example, if you bid \$1.50 maximum on the keyword 'widgets', and that's the highest bid, you'll probably show up first in line. If 100 people click on your PPC listing, then the search engine or PPC service will charge you a maximum of \$150.

Depending on the platform, set-up and cost can vary significantly when it comes to PPC or any paid advertising.

The most important thing to remember when considering paid advertising on social media is to invest in advertising and marketing where your audience will actually find it! For example, if a business' target audience is 50-65 years old then

it doesn't make sense to promote your brand on SnapChat because that is not where this demographic typically interacts. Furthermore, it is important to assess the return on investment (ROI), carefully: Is the result worth the cost, particularly with regard to conversions (i.e. calls or leads to actions). If the ROI is not adequate, then the campaign will need to be modified for future use. This kind of tweaking will result in the optimize your marketing budget.

Of course, other forms of paid advertising also fall into the overall marketing budget such as TV, billboard, radio ads, etc.

Earned or Organic marketing Campaigns

Earned marketing happens when content, a video or a photo that has been created and shared is seen as *valuable* to others. Often sharing and giving value through information and product tips for free, will get a business' attention.

Social media marketers often hear their bosses telling them to make a post, blog article or video "go viral". Brands often have a very hard time of this because the modern consumer is very wary of any content that is sale-sy or overly humanistic. Emotion *is* a powerful motivator. Apple Inc. has done an amazing job, year after year of making us believe their products will make a happier, merrier Christmas for everyone with their video advertisements. Businesses need to be very careful and wary of this technique to ensure an attempt at pulling heartstrings doesn't backfire and result in negative reactions. (Remember the Kendall Jenner Pepsi Ad?)

People and companies want to see the personality and authenticity behind a brand. Personal messages and carefully curated content can be a magic combination.

EXERCISE 4.1 Reflect on a social ad you saw recently

Think of a time when you saw a social media advertisement – a reel, story, clip, photo, etc. Briefly reflect on how relevant the post was to you by considering the following questions:

1. What was the post's goal?
2. What was your alignment with the business?
3. Was the outcome successful, did you click through the ad?
4. If you clicked-through did you find what you expected at the end of the link?
5. What do you think the business could have done better to capture your attention?

Media Attributions

- Digital_marketing-trifecta

4.3 Policies & Terms of Use

Businesses who market online must keep up-to-date with current world events. For example, you do not want to be caught posting a “Motivational Monday” quote or a scheduled humorous anecdote right after a natural disaster. In fact, companies have been warned time and time again¹ to not post about the death of a famous individual, about 9/11, or a terrorist attack, etc. on social media. In these types of situations many still feel that companies should stay silent. Individuals who feel passionately about responding to the crisis should use their personal accounts to do so.

Creating Policies

Polices are required to be proactive and mitigate potential risks of posting on social media.

Customers are turning more and more to social media to find information about products and services. Companies are realizing the importance of creating policies to control their website’s “official” presence, which may include blogs, social media, Google My Business, etc. Policies can ensure messaging delivered online plays a positive role in creating and maintaining a brand’s reputation. Businesses may also have

1. AdAge. (2013, September 11). AT&T and other are browbeaten on twitter following 9/11-related posts. <https://adage.com/article/digital/t-schooled-twitter-inane-9-11-tweets/244103>

an “unofficial” presence – developed by employees’ personal blogs, posts, online interviews, reviews, YouTube videos, LinkedIn accounts etc.

“Policies that draw clear lines on what employees should and shouldn’t say online, whether in company-authorized content or in personal posts, can help you make sure that your company is being represented positively and appropriately in cyberspace.” (Guerin, L., 2017, p. 7)²

Social Media Policy

The following is a hypothetical social media policy to guide online interactions for the fictitious business: Land. This policy has been modified and updated from a template provided by Lisa Guerin, J.D. in *Smart Policies for Workplace Technologies*.

Example of a Social Media Policy

Our Company’s Social Media Presence

Social media is an important technology for our Company. Social media tools, including Company-sponsored blogs and microblogs, social networking sites, video or picture sharing sites, wikis, and other means of communicating online, are a key part of our Company’s face to the public. Social media platforms offer opportunities to shape opinions about our products and our company, to communicate directly with

2. Guerin, L. (2017). *Smart policies for workplace technology*. Berkley, CA: Nolo

customers and clients, to provide added value for our customers, and to be part of the online conversation about important developments in our field.

Social Media Goals

We use social media primarily to communicate with and add value to our clients' lives. Our Company uses three separate social media platforms to engage with clients and target future customers through paid, owned and earned marketing campaigns. Our company maintains **Facebook**, **Instagram** and **TikTok** accounts and uses them separately to connect with a variety of audiences. It is our goal to keep our content original and not to post duplicate content across all of our platforms. Our company uses each account for a specific purpose laid out more specifically in the Sponsored Social Media Strategy document.

Who May Post

Only authorized employees may post to Company-sponsored blogs, social networking pages, or other social media. Authorization is granted by both co-owners. Before you begin posting content, you must have attended a BC accredited social media training course and have official authorization from both co-owners.

Guidelines for Employees Who Post

1. **Be respectful.** When you post about the Company, its products and employees, customers, and competitors, use good judgment. Make sure your posts are professional and respectful. It's fine to disagree, as long as you do so in a civil way that is not offensive.
2. **Add value.** We expect you to write about new developments and trends in your area of expertise. Don't just recycle news or posts; add your perspective and

provide useful advice to enable consumers to better use our services.

3. **Post often.** We want readers to return and see what's new at our Company, and the best way you can help make that happen is to post at least every other week.
4. **Be part of the conversation.** When appropriate, link to other sites, articles, blogs, and media on the same topic. By sharing our partners' content we show that we are part of the Victoria community. And of course, link to our Company website when appropriate.
5. **Accuracy counts.** Before you publish a blog post or a social media entry, review it for accuracy. When writing about Company business, check with the appropriate people in-house to make sure you've got the facts straight. If you later learn that you've made a mistake, say so and correct it.
6. **Avoid inappropriate topics.** We want you to generate interest, but there are many ways to do that without offending readers or placing the Company in the midst of a controversy. All Company policies, including those that prohibit harassment, discrimination, and unprofessional conduct, apply with equal force to your online posts.
7. **Respect ownership of intellectual property.** Don't copy or use work by someone else (including text, photos, and video) without proper authorization and, if required, attribution. If you're referring to a copyrighted story, keep your quotes short; if you want to refer to another's work, it's best to link to it in its entirety.
8. **Keep the Company's secrets.** Don't refer to or reveal the Company's trade secrets and proprietary information. This includes stock offerings, financials, products in development, and other confidential information. If you aren't sure whether to reveal particular information in your post, speak to your manager.
9. **Maintain customer and employee privacy.** Do not

mention customers by name or identifying details without authorization from your manager. If you want to discuss or mention coworkers in your posts, you must get their written permission first.

10. **Ask—and think—before you post.** Remember, your posted content represents you and the Company to the public. All of us want that representation to be positive. If you aren't certain that what you plan to post is appropriate and legal, check with your manager before you post. Your questions are always welcome.

Identify Yourself

When you respond to a post/comment/DM (direct message) on any Company-sponsored social media, such as our Facebook or Instagram pages, you must identify yourself by name and by your position at the Company. Anonymous responses or posting under pseudonyms or aliases is prohibited. The same rule applies if you are posting comments on behalf of the Company to one of our competitors' social media accounts, websites, or product pages.

You Are Responsible for Your Posts

Remember, you are legally responsible for what you post online, whether on a personal site or a Company-sponsored site. You can be held personally liable for defaming others, revealing trade secrets, and copyright infringement, among other things. All Company policies apply to your online posts on Company-sponsored sites.

Handling Comments

We encourage reader responses and comments to our social media postings. However, not all reader commentary is fit to print. If you post entries that elicit reader responses or comments, you must follow these guidelines:

1. Do not allow the posting of spam, advertisements, or comments that merely link to another website (unless they are responsive to the original post). Delete these posts.
2. Do not allow the posting of any comment that is obscene or offensive. Delete these comments.
3. Do not allow the posting of any comment that reveals trade secrets or proprietary information. For example, if a competitor's employee reveals that company's confidential information in a comment, remove it immediately and report it to your manager.
4. Do not remove relevant anti-Company comments simply because they are negative. Do not engage in online arguments or "flame wars" through social media commenting. Talk to your manager about how—and through which medium—to respond appropriately.
5. If you receive a complaint about the company or its products in a comment, immediately notify the Co-Owners, so it can handle the situation directly.

Because of the time and resources it would require to screen comments to our Company's blog(s), we do not post reader comments. Please turn off the "comments" feature of any Company blog.

4.4 Key Performance Indicators

Successful businesses start with clear goals and business objectives. For example, one short-term goal may be to reach 5,000 new potential customers in a month, by harnessing the reach of social media. Business goals always need to be directly related to the business objectives to avoid wasting resources and losing focus. Keep this in mind to create content that is authentic to the organization and also consistently purpose-driven.

Data | Metrics | KPI

Data collection helps a business to measure growth, track customers, and can be used for employee accountability. A measurement or datum can be the number of clients, sales in a region, overall revenue, etc. Measurements, such as number of customers, only really have value when they are compared within the larger context of a business goal which is called metrics. For example, the number of new customers in the past month.

Data and metrics are both necessary to build and develop statements that show how a particular action (e.g., targeted Facebook advertising) performs. Tracking key performance indicators narrows the set of data and metrics to only those relevant to a particular action.

KPIs vary depending on business and industry

The KPIs that an organization measures will vary based on: the type of activity and industry, its customers, and its staff. However, they are likely to include most of the following:

- Net profit
- Net promoter score
- Customer engagement
- Customer complaints
- Market share
- Share of voice
- Carbon footprint
- Supply chain miles
- Waste recycling rate
- Employee satisfaction
- Staff churn
- Return on investment (ROI)

Once you have defined your business' goals and strategy, identifying and aligning the KPIs appropriately for your business is much easier.

A company's social media marketing plan will rely heavily on KPIs to understand the *value* of the actions and tasks taken in social media marketing.

4.5 Meta

Meta, previously Facebook, primarily owns and operates Instagram, Facebook, SnapChat and WhatsApp.

Instagram

Instagram is a visual montage of events, beer gardens, food, water slides, etc. As a social media platform, Instagram is intuitive and user-friendly. Images and reels are at the heart of Instagram focusing every post.

According to a Sprout Social Demographics report, the majority of Instagram users are between the “largest age group of 18-24 (30.8%) with 25-34 close behind (30.4%)” (Zote, J. 2024)¹. This makes Instagram a very attractive tool for businesses who are looking to connect with Millennials and Gen Z.

There are so many features available for businesses in today's Instagram app: Stories, Reels, Live, IGTV (for longer videos), Guides and of course posts (ads or organic).

A lot of businesses use Instagram as a backbone for their social media strategy – posting in and out of TikTok, Facebook and Twitch. It is a great place for A/B testing and featuring collaborations with content creators. Often different companies have other businesses to work with and invite them to post on their account. Getting the first 10,000 followers is

1. Zote, J. (2024, February 14). *Social media demographics to inform your 2024 strategy*. <https://sproutsocial.com/insights/new-social-media-demographics>

very hard and takes time. It does get easier with consistency and added-value content.

The development of Instagram is prioritized as a mobile app and now more recently as a mobile website. The UX (User Experience) for Instagram is enhanced for display on the smallest screens using responsive design.

From its inception in March of 2010, Instagram went from a small team of **four** employees to a full-fledged department. Instagram was purchased by Facebook, now Meta, for USD \$1 Billion in 2012 with over 27 million users. Instagram has well over 1 billion active users².

There are some reasons why Instagram is one of the fastest growing social media applications. The app ensures you are locked in even if you click out to a linked website: The ability to keep users in the app while feeding them external content ensures that users stay online (in Instagram) longer.

In Instagram, users can post multiple photos and videos. Using filter effects and layout controls³, users can easily control how a post will look. Brands, like Airbnb⁴ and Madewell⁵ are model businesses for using Instagram effectively to create a strong following of potential and current customers.

2. Statista. (n.d.). Most popular social networks worldwide as of January 2022, ranked by number of monthly active users.

<https://www.statista.com/statistics/272014/global-social-networks-ranked-by-number-of-users/>

3. Instagram from Meta. (n.d.). Give people the power to build community and bring the world closer together.<https://about.instagram.com/>

4. [Airbnb]. (n.d.). Welcome to Airbnb. Where to next?
<https://www.instagram.com/airbnb/>

5. [MadeWell]. (n.d.). <https://www.instagram.com/madewell/>

These businesses harness embedded links within their Instagram images to direct individuals to their product/service e-commerce websites creating conversions that eventually lead to sales. Using attractive imagery and innovative product tips and details, companies can create a frenzy of interest on Instagram.

Instagram Business Page

It is very easy to create a business Facebook and Instagram account. You can add call, text, message, email, and add custom pages right to your Instagram account, making it very easy for your customers to connect with you. The analytics in Instagram can also give you insights into the most effective actions, areas where you are not excelling in your campaigns, and content you should keep focusing on. You can further your reach by adding hashtags, tags in the caption of your photos, and hash-tagging the location as well. These simple tricks can greatly increase your visibility on this platform. Make sure that the caption under your photo adds context to the photo, too.

For accessibility all Hashtags should be written in CamelCase

Update your name to a search friendly-keyword, add a high quality photo for your logo, in your bio state what value you offer and what you offer.

Mix it up – add a boomerang (loops back and forward) short video, layout, or multiple photos in what's referred to as a story, to make the content more diverse. Go live on Instagram to highlight what your business is doing at the moment (it will stay "live" as a story even after you're done). As a business, you can then use stories to target users in your area, or get featured in something like your city's story.

Reels for growth and organic reach, stories for personal

connect and Live streams for collaboration and engagement. Reaching new people. Stories make the connect a little deeper.

On the section below the profile is where you can activate guides – specific and robust tips are good ideas. Check out Natasha Samuel's @ShineWithNatasha's excellent use of guides. They can be an added benefit to your profile.

An Instagram strategy is often very different in terms of organic and paid messages. What is the actual message you want to see? How are you going to showcase your brand authentically? Do you have a story to tell? Can you let customers know the experience they are going to have with your brand? All of these questions can help to determine which type of post you should create.

Facebook for Business

Skim the Facebook Ads Manager⁶ paying close attention to the type of advertisement you might be interested in creating for your project business. With your business in mind, while reading the Facebook Ad Manager Step-by-Step guide⁷, answer these questions to help you focus and reflect on information provided:

1. What ad objective makes the most sense for your business?
2. What format would be most effective for the ad objective?
3. Would the target audience be the same for this ad as you

6. Meta. (n.d.) <https://www.facebook.com/business/tools/ads-manager>

7. Meta. (n.d.). About ad creation in Meta Ads Manager.

<https://www.facebook.com/business/help/282701548912119?id=649869995454285>

identified in your SM plan?

Facebook gives businesses plenty of options to create and target advertisements to potential customers. Facebook will walk you through forms to help you identify a marketing objective: awareness (brand recognition, raising the overall profile of your brand), consideration (traffic, engagement, video views, etc), or conversions (click through to purchase). Deciding this step up-front is part of creating a micro-action for your marketing campaign.

Each statistic can be customized through the tools available during the creation of the advertisement. When setting up a campaign, you create a unique ad account within the campaign which is slightly convoluted but helps tracking.

Arguably, the most important setting of your ad is determining a target audience: people who you think will be interested in your product/service.

Detailed targeting can help a business narrow the range of the ad to a more ideal potential reach⁸. For example, targeting traffic further, based on their behaviours.

The next step in the ad process is deciding the placement of the ads and allocating a daily/weekly budget for the campaign.

One approach for setting a target audience is to start broad with a campaign ad and then see who clicks on it. Use the analytics from the ads to dictate the next target audience, narrowing the scope each time until you are consistently reaching an audience that engages with your product or service. While you can use the basis of the persona you created

8. Meta. (n.d.). Glossary of ad terms. <https://www.facebook.com/business/help/447834205249495>

for your social media plan to guide your reach, you will also want your ads to be flexible, to maximize reach if the persona is too limiting.

Facebook Community Standards

Facebook Community Standards⁹ outlines what you can and CANNOT do on their platform. Brands and individuals must follow these rules or risk having their posts removed or entire accounts deleted. The rules range from restricting dangerous organizations, to removing hate speech, and what to do when a business closes.

Moderating Content

Facebook's use of moderation has come under criticism repeatedly. For example after the leak of over 100 internal Facebook training manuals, The Guardian released a report on their investigative findings from these documents in an article entitled: Revealed: Facebook's internal rulebook on sex, terrorism and violence.¹⁰ (*WARNING: The report quotes hate speech and is explicit – not required reading*).

In short, the internal algorithm that assesses what content is

9. Meta. (n.d.). Facebook Community Standards. <https://transparency.fb.com/policies/community-standards/?source=https%3A%2F%2Fwww.facebook.com%2Fcommunitystandards>

10. Hopkins, N. (2017, May 21). Revealed: Facebook's internal rulebook on sex, terrorism and violence. <https://www.theguardian.com/news/2017/may/21/revealed-facebook-internal-rulebook-sex-terrorism-violence>

considered legitimate according to the Facebook Community Standards seems to have some flaws. When “training” the algorithm to identify who are subsets of vulnerable individuals that need protection on the site, for example, white men were selected above black children. The ethical consequences of Facebook’s moderation of content have a lot of businesses and individuals worried about the racial inclinations of Facebook itself.

Note When logged into Facebook individuals may feel like they are browsing in privacy on their personal computer looking at their emails, other websites, and images. However, interacting with an online application like Facebook leaves you open to being tracked. Cookies are actively tracking any website you go to that has a Facebook “like” button on it.

Written in Pen

Everything published on the internet is “written in pen”, as the expression goes, not erasable pencil. It is permanently stored even when you yourself can no longer see it, as you can never be sure that it has actually been erased. Post with care. If you are representing a business and posting online using your business account, use particular care. There are some individuals on the Internet who screen-shot posts to ensure that they can be discussed in future, even if they are deleted by the account. Assume nothing on the Internet is really ever deleted.

Get Verified

Businesses should consider taking the extra steps to get what Facebook calls a verified profile. The gray verification badge

lets people know that a Page for a business or organization is considered authentic. Read more on the Facebook Help section of Page Verification¹¹.

Gain traction

With over **2.9 billion monthly active users as of the first quarter of 2022**¹², Facebook is an extremely viable platform for businesses to connect with individuals. It is so popular, that Facebook has created a complete website and manual dedicated to helping businesses succeed in social media marketing on Facebook¹³. Of these, there are a few top tricks of the trade that have been learned through trial and error by numerous businesses engaging in marketing through social media, that we will cover briefly here.

Note This list is limited to a few of the possible approaches to ensuring that your organic posts (not paid advertisements) are visible online.

Earned social media marketing often requires posting regularly in what is often called organic (not paid) posts. Getting an organic post to be shared and liked is essential:

Calls to Action – ask a person to complete an action while

11. Meta. (n.d.). About verified Pages and profiles.
https://www.facebook.com/help/100168986860974?helpref=faq_content
12. Statista. (n.d.). Most popular social networks worldwide as of January 2022, ranked by number of monthly active users.
<https://www.statista.com/statistics/272014/global-social-networks-ranked-by-number-of-users/>
13. Meta (n.d.). Personalized Marketing Plan Take the guesswork out of growing your business. <https://www.facebook.com/business/>

sharing or commenting on your post to promote brand awareness. Be advised that particular text that is used in these types of posts, such as “comment”, “like” or “share”, is no longer best practice. As of 2015 Facebook downgrades the visibility of posts that ask users to comment or like directly in their post message. Also, you must be subtle but convincing in your wording so that you authentically engage your audience to act, without triggering Facebook’s downgrades.

Providing value to your audience is the best way to promote your business. What information or tips can you provide your Facebook audience that will get them talking? What fun activities or promotions would they want to tell their friends about?

Create a successful Facebook Company Page

Beyond all of the best practices that we discussed in previous lessons, such as being authentic, scheduling posts, creating actionable micro-actions, etc. the most important on Facebook is to create a clean and clear Company Page. You should take advantage of the cover photo area and insert an enticing introduction video or a large attractive (C.R.A.P.) image, create tabs on the page to direct individuals to the various parts of your FB account that you want to showcase, and most importantly if your company sells products online you will want to set up a Facebook Shop. It is advisable that you create a full business page profile on Facebook with a detailed “about” page which links to your website. If you want to have individuals follow your page, provide them with a reason to do so. For example, you provide product comparisons.

Paid vs. Organic Advertising

Don't only use social media to sell. As we discussed, provide added value. If you continuously post only campaign or sale-sy ads on Facebook without paying for ads, Facebook will lower your visibility. Facebook is a business. Its primary source of revenue is advertisements created by brands using the platform to connect with future customers. While it is free, Facebook is not structured to allow businesses to reach their full potential through organic posts alone. Organic posts will never get the same reach as paid targeted advertisements. In fact, if you continuously only post promotional posts on SM, individuals will begin to consciously and subconsciously ignore your brand because you are only in it to sell.

This article by Post Planner succinctly lists some very important SM tips for companies seeking to make an impact on Facebook: [How Facebook Pages Succeed with 13 Simple Best Practices](#).

Beyond Imitation

There are many examples of successful brands that are leveraging Facebook to effectively market and promote their brand. One important thing to remember, however, is that once you get comfortable and established on SM don't feel like you need to keep emulating successful companies in a way that limits your unique brand. Feel free to be different, to branch out and be even more authentic. To stand out in Social Media, you need to feel like it is ok for the posts and messages that you write and create online to be "your words" and not borrow or copy from others.

4.6 LinkedIn

LinkedIn is a good way to market yourself and now your business. To be successful in promoting a brand on LinkedIn, you need to be able to write well and see from the perspective of other professionals.

Why LinkedIn Matters

There are some reasons why LinkedIn is a valuable social media tool.

1. It is your resume online
2. Search of your name puts LinkedIn on the First page of Google results
3. Builds credibility
4. Excellent messaging and networking tool
5. Great publishing tool for getting information to industry professionals

The first step of building your LinkedIn presence is to manage your profile. Make sure you have the following elements in your profile

- Title
- A headshot photo that has been professionally taken (not you sipping drinks in your backyard)
- Summary of your professional biography
- Education
- Experience
- Volunteering
- Contact Info

- Get a customized LinkedIn URL to add to your resume and website

Note LinkedIn was more centred on individuals rather than business entities. Now, businesses are joining the conversation. Businesses should be an advocate for their industry by sharing knowledge, insights or perspectives.

LinkedIn No-Nos:

- Don't be boring or too self-specific
- Do not sell
- Do not use any of the automatically created text messages (on any platform) – write a custom message instead when reaching out to new connections
- Do not post content on multiple platforms at the same time – stagger it!

“Keep it professional and specific for a business audience.”

-Narges Nirumvala

As stated previously, each social media platform needs to be treated differently. LinkedIn is the most professional of the lot. Act as you would if you were interacting with people in an office. If you write original business content on LinkedIn, share it on Facebook or Twitter a week or so later.

See Nargea Nirwuvla's LinkedIn profile¹ for inspiration.

1. Nirumvala, Narges. (n.d.). <https://www.linkedin.com/in/nargesnirumvala/>

4.8 Social Media Integration

Smaller companies may find it more convenient to have one person running their website and all of their social media accounts, but most medium or larger enterprises will have a full team that manages their website, and another that leads social media strategy. These are often situated in a marketing or communications office. Both the web team and the social media communication teams need to interact and communicate regularly so that the website and social media accounts have consistent messaging, tone and usability.

Web Teams

Front-end developers

A front-end developer is someone who works on the style and design of a website. These developers need to know HTML, CSS and usually be comfortable with JavaScript. Other web programming languages that are often desired for front-end developers are jQuery, Angular JS, and Polymer Web Components (to name just a few).

More specifically, front-end designers are often called **UX (User Experience) Designers**. Having the ability to wire-frame or create sample website layouts in a graphics imaging software such as Gimp or Photoshop is an asset to this position.

Back-end developers

Back-end developers are more in-depth programmers who add dynamic functionality to a website. For example, they would be needed on a team for websites that have any user login, e-commerce database, server-side forms, etc. These developers enhance websites by using programming languages such as JavaScript (or node), PHP, MySQL, Java as well as complete knowledge of the most current CSS and HTML to build more advanced functionality into the website.

Marketing/Communications Teams

Copywriter

A copywriter is often the person who is responsible for creating the web content (blogs, snappy intro text, etc.) and making sure that copyright laws are not being broken. This individual usually works closely with both the Communications Team and the Web team.

Social Media Manager

The Social Media Manager is in charge of creating, maintaining and executing the social media strategy. They are at the centre of managing a company's online presence and should have excellent leadership skills, writing and editing capabilities, and advanced knowledge of web analytics. Other titles for this position might include social media strategist, social media coordinator, or digital communications strategist.

Social Media Assistant

The social media assistant is typically the individual responsible for posting to social media and maintaining the voice of the

company on all social platforms. The strategy will be determined by the social media manager and the assistant(s) will be in charge of ensuring the execution of the campaigns, and following up with customer comments and complaints. The social media assistant needs to have excellent written and oral communication skills and be able to effectively multi-task numerous projects and expectations from the team. They are often responsible for delivering reports to the manager on the success of various campaigns and more specifically, on the ROI of each micro-action.

Graphic Designer

An in-house graphic designer can be an invaluable asset for a business and often seen as a luxury. As the web becomes more and more emoji and image-centric, clear, clean graphics are more and more in demand. Online solutions such as fiverr and logo tournament are significantly lowering the bar for entrepreneurs to access high-quality graphics.

In fact, these two websites claim to provide you with the same services as a local graphic design company at significantly lower prices. The market, however, is still relatively split between local companies who invest time and dedicate their expertise to continued support, versus individual purchasing of graphics online. Plus now with digital tools such as Photoshop Online Tools, Photopea, Canva (to name a few), it seems like just about anyone with some design sense can try creating an attractive call-out image banner.

Once your social media plan is solid and adopted across your company, social media accounts can be integrated within your website.

Bridging Your Website and Social Media Accounts

Creating meaningful content for your website is essential, but if it is not publicized (usually by sharing across social media networks), the only way it will be seen is if people know to go to your website for it, or it gets picked up by a search engine. Social media posts that link back to your main website can help draw people to your content and to your business' services.

The first step to integrating your social media accounts and website is to add links from your social media accounts to your site and vice-versa. Adding social media icons is reasonably simple to do within a variety CMS (content management systems) like WordPress.com.

Adding links to related posts, in-line with the body of the text on your website, can also result in a higher share rate on your blog. In reality, it is a circular process, link from your social media posts to your website and your website to your various social media accounts. This allows your visitors to enter into the loop at any point and get access to both your other social media posts and your site content.

For example, if one of your social media campaigns uses a contest, it might be useful to have a supporting page on your website that outlines prizes, expectations, and rules for participation. You can then link to this web page in your contest post.

Evaluating Your Content's Lasting Value

Evergreen Content

Evergreen content is when you design your web and social media content to be worthwhile for years to come. This allows your posts to get more clicks over time. To do this, avoid the use of specific dates/time (e.g., here's what to do this New Years, rather than here's what to do for New Years 2023). Refresh your content regularly to ensure it remains relevant, and create posts with topics that have either more generic value, or answers specific questions in an broadly applicable way.

Analytics

Analytics can help you find out more about how traffic is accessing your website. Are people clicking through to your site from Facebook or Twitter? By integrating Google Analytics on your website (not available on the free plan of WordPress.com), you can find out what the bounce rate (time before people leave) of each page of your site is, and specifically whether they come from Facebook, Instagram, or Twitter. This information can help “turn insight into action” (Google Analytics, 2017). By evaluating website traffic and the behaviour of individuals who access your website, you can gain knowledge about what is and isn't working on your website.

Evaluating social media analytics (e.g Facebook business analytics) and any other campaign analytics will also help you better define and refine your target audience, and get to know what your customers want from your business.