Hootsuite™
Best Practices

University of Waterloo
Guide for University of Waterloo accounts through the social media management system, Hootsuite™.
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Hootsuite

is a valuable tool for leveraging social media as a priority communication channel.

In order to better use Hootsuite, training is provided through Hootsuite University and is made available to all members of our Enterprise system at no extra cost.

Beyond the operational training delivered by Hootsuite, the University of Waterloo has created additional best practices to ensure your Hootsuite communication aligns with the overall university goals and will empower us to get the most out of the tool as an

Need further help?

Stay up to date in today’s rapidly changing media landscape through social media education and industry-recognized certification. Learn to manage your social media like a pro and start implementing your skills today at Hootsuite University.
Content Creation and Sharing

Dealing with Assigned Tasks

Users have the ability to assign tasks to other members of the Hootsuite Enterprise team. Tasks are assigned by clicking on the top right of a piece of content.

When a task has been assigned and completed it is imperative that the task is recorded as "Resolved". Assignments recorded as Resolved will be archived and assignment will help measure our client service.

Scheduling Content

The scheduling icon in the compose message box enables users to schedule content to be posted. Posts must be scheduled at least 5 minutes into the future.
Scheduling content will automatically archive your messages. **It is recommended that each message be scheduled, even if it is only 5 minutes in advance.** Archiving your social content will help comply with record keeping requirements and manage social media records.

The archived content calendar provides an overview of all social content that has been scheduled by university accounts. It can be viewed by day, week or month.

**Auto Schedule**

Hootsuite uses technology to optimize and automate the content scheduling process. Hootsuite will select the best time for your content based on your specific platforms and audiences. Slide the Auto Schedule switch to “on”.
By clicking the gear icon you can set parameters for your messages. You can adjust the time range and the preferred days for your post to go out.

MSC has developed a model to tag content based on 8 criteria. Each area can define their own criteria but Author, Campaign and Themes should be prioritized. Below is the MSC tagging strategy:

<table>
<thead>
<tr>
<th>Category</th>
<th>Tags</th>
</tr>
</thead>
</table>
| Activity | • Response  

• Share  

• Post  

• Promotion |
| Author   | • Current student  

• Prospective student  

• Alumni  

• Internal  

• Community members  

• High influencers  

• Government |
| Campaign | • Campaign name (add specific campaign tag) |
| Crisis   | • Weather  

• Building operations  

• High level crisis |
| Department | • Faculty  

• Athletics  

• Student success  

• Registrar’s office |
| Event    | • Event name (add specific event tag) |
| Flag     | • Inappropriate messages  

• Hoax  

• Reputation damaging |
| Themes   | • Entrepreneurship  

• Research  

• Co-op  

• Student experience |

**Adding Tags**

Users can add tags to classify and assess content. The tagging function can be accessed when composing content.

Tags can help evaluate responses when monitoring campaigns or event feedback, classifying in-stream messages to measure volume and sentiment, sharing content with organization members, and view aggregated post counts for internal tags.
Measurement

UTM Codes

What are UTM codes?
A UTM code is attached to a custom URL to track a source, medium and campaign of your link. Google Analytics can tell you where searchers come from as well as the campaign traffic directed to your website.

When to use them?
UTM codes should be used when directing traffic back to any Waterloo webspace. UTM codes can also be used for tracking email marketing, banner advertising and paid social media campaigns.

What are the benefits of UTM codes?
By creating a separate UTM code for each link you can get data on what generates more traffic, conversions, etc. Furthermore, you can track not only the source and the medium (Twitter, Facebook, LinkedIn, etc.), but even individual campaign names like “Convocation or “Orientation”.
“utm_source” should be adjusted using the Waterloo UTM Source Codes (pg. 8). Each code will feature the department short code followed by either social_organic or social_paid depending on the type of campaign.

“utm_medium” should be adjusted to the relevant medium used – i.e. twitter, facebook, linkedin, etc.

“utm_campaign” will denote the specific name of what you are measuring.

Note: These three parameters are mandatory when creating UTM codes.
### Waterloo UTM Source Codes

<table>
<thead>
<tr>
<th>Faculty/Department</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alumni Relations</td>
<td>alum_social_organic</td>
</tr>
<tr>
<td>Centre for Career Action</td>
<td>ceca_social_organic</td>
</tr>
<tr>
<td>Conrad Grebel</td>
<td>con_social_organic</td>
</tr>
<tr>
<td>Faculty of Applied Health Sciences</td>
<td>ahs_social_organic</td>
</tr>
<tr>
<td>Faculty of Arts</td>
<td>arts_social_organic</td>
</tr>
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</tr>
<tr>
<td>Faculty of Environment</td>
<td>env_social_organic</td>
</tr>
<tr>
<td>Faculty of Math</td>
<td>math_social_organic</td>
</tr>
<tr>
<td>Faculty of Science</td>
<td>sci_social_organic</td>
</tr>
<tr>
<td>Food Services</td>
<td>food_social_organic</td>
</tr>
<tr>
<td>Housing and Residence</td>
<td>res_social_organic</td>
</tr>
<tr>
<td>Human Resources</td>
<td>hr_social_organic</td>
</tr>
<tr>
<td>Institute of Quantum Computing</td>
<td>iqc_social_organic</td>
</tr>
<tr>
<td>Knowledge Integration</td>
<td>ki_social_organic</td>
</tr>
<tr>
<td>Office of the President</td>
<td>otp_social_organic</td>
</tr>
<tr>
<td>Renison</td>
<td>ren_social_organic</td>
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<td>School of Pharmacy</td>
<td>pharm_social_organic</td>
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<tr>
<td>St. Paul’s</td>
<td>paul_social_organic</td>
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<tr>
<td>Stratford Campus</td>
<td>strat_social_organic</td>
</tr>
<tr>
<td>Student Success (uwaterlooLife)</td>
<td>life_social_organic</td>
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<tr>
<td>University of Waterloo</td>
<td>msc_social_organic</td>
</tr>
<tr>
<td>UWaterloo LiVE</td>
<td>live_social_organic</td>
</tr>
<tr>
<td>Velocity</td>
<td>vlo_social_organic</td>
</tr>
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<td>Waterloo Institute for Nanotechnology</td>
<td>win_social_organic</td>
</tr>
<tr>
<td>Waterloo Institute for Sustainable Energy</td>
<td>wise_social_organic</td>
</tr>
<tr>
<td>Waterloo Orientation</td>
<td>orient_social_organic</td>
</tr>
<tr>
<td>Waterloo News</td>
<td>news_social_organic</td>
</tr>
</tbody>
</table>

### UTM_campaign codes

<table>
<thead>
<tr>
<th>Faculty/Department</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Relations</td>
<td>community_relations</td>
</tr>
<tr>
<td>Athletics</td>
<td>athletics</td>
</tr>
<tr>
<td>International</td>
<td>international</td>
</tr>
<tr>
<td>Waterloo Stories</td>
<td>waterloo_stories</td>
</tr>
<tr>
<td>Waterloo News</td>
<td>news_release</td>
</tr>
<tr>
<td>Faculty News</td>
<td>news_(faculty code)</td>
</tr>
</tbody>
</table>
UberVu for Campaign Marketing

As Hootsuite Enterprise customers we have access to UberVu analytics. UberVu is an insights driven dashboard that provides extended data on specific keywords.

UberVu provides Enterprise users with a limited number of feeds, so each request must go through the Manager, Social Media and Community Engagement a2miller@uwaterloo.ca.

UberVu should be used for hashtag campaigns and monitoring specific key words that exist within a limited time frame.
Operations

Recommended Dashboards

Each user in Hootsuite can create their own dashboards to best reflect their social media monitoring and publishing needs. Within each dashboard users can create tabs, these tabs help organize your social media networks, apps and keywords.

To set up a tab, click on the ‘+’ sign at the top of your dashboard. Click on the tab and provide a name that will help you index the information that will exist in the tab.

Recommended Streams

Once you have your tab you will want to add streams. A stream is a column of data that you can pull from any social network.

**Facebook**
- Wall Posts
- Private Messages
- Events
- Scheduled Stream Posts

**Twitter**
- Home Feed
- Mentions
- Sent Tweets
- Scheduled Tweets
- Direct Messages

**Instagram**
- Iconosquare
The layout of your dashboard is completely up to you. Each user will have a unique view of Hootsuite that can be completely different than those within your team. However, for larger teams it is a good idea to have similar streams so each of you are catching the appropriate data.

The streams can provide you with a single line of sight on key words and themes that can help you complete your business objectives.

At anytime you can move, adjust or delete a stream by using the utilities at the top of the stream.

Monitoring keywords and hashtags through your tab is a great way to better understand the conversation around specific themes. You might also want to add hashtags for campaigns to easily filter the content and improve your ability to engage.
App Directory

The Hootsuite App Directory is a collection of applications and extensions that can be added to the Hootsuite dashboard. Hootsuite Enterprises users have full access to all Apps in the directory.

Recommended Apps

IconSquare for Instagram – Managing your Instagram accounts, provides basic analytics on Instagram

Youtube by Synaptive – Manages your Youtube account, allows you to schedule content, engage on existing content and post

TrendSpottr – Helps you find trending topics across the social landscape.

Nexalogy – The Nexalogy app allows you to view interest maps to see ideas and connections in your social graph, view details on Twitter volume, top concepts, and hashtags, and see top links related to your account or search term.
**Geo-Location**

Connecting with a specific audience in an exact location might help achieve your business objectives. For example, if you wanted to know what guests at the Canada Day celebration are saying we can set Hootsuite geo-location codes to only pull social content from the coordinates around Columbia Lake Field. This can be a powerful client service tool and help us identify any potential problems at the event.

To use the geo-location feature on Hootsuite, go to the search icon in the top right hand corner of the screen.

Once you enter your search term click the Location symbol.

Hootsuite will automatically provide a geo location coordinate of your area. You can extend the reach for your search by adjusting the KM range manually.
Using Hootsuite Collaboratively

One of the key business applications of Hootsuite is the collaborative feature the software offers. When using the tool we recommend you try to share, engage and assign tasks, which can help us achieve our objectives of developing a collaborative social media model.

A few tips on using Hootsuite more collaboratively:

- Hootsuite offers users the ability to publish content to other channels within the Enterprise system. When doing so, create posts and updates that reflect the voice and tone of the account you wish to publish.

- Examine the Enterprise content calendar. You can see all scheduled content from Waterloo accounts in one place and know what is coming.

- By scheduling your content others will be able to see it in the content calendar and possibly leverage it on their channels.

- When submitting a post to a channel you have ‘limited’ access, the account admin is able to approve, delete or reschedule the content in Hootsuite. All conversation can be held in Hootsuite to avoid unnecessary emails and ensure workflow is documented.

- If you see content on your channel that would be better managed by a different department use the assign feature to streamline workflows.

- Hootsuite provides a conversation feature within the Enterprise system. This is a great tool for real time collaboration with internal partners.
Crisis Management in Hootsuite

Using a collaborative social media tool can help us meet our business objectives, additionally Hootsuite will also add value as a crisis management tool.

A Crisis Team has been set up on Hootsuite to allow high level messaging to be distributed across all channels in the event of a large scale emergency. Please note, communicating emergency content across all channels will be reserved for high level emergencies and those messages will be created and scheduled by the crisis communication team. There is no action required by other community members.

If you notice an issue on social media that requires the attention of university communications or campus police immediately assign the content to the Manager, Social Media.

For lower level crisis and emergencies drafts will be created in the Hootsuite Enterprise system and made available to all teams.

Crisis Communication Drafts

Twitter content has been created and shared in the draft folder around some common crisis that could manifest over time. These drafts will be made available to all members of the Enterprise system.

Weather

- The University of Waterloo is open today. Please visit our weather statement for more information.
- The University of Waterloo is closed today. Please visit the homepage for more information.
- The University of Waterloo is monitoring current weather patterns and will make an official announcement via Twitter and homepage by 6am tomorrow.
Permissions

In order to stimulate the collaborative nature of social media, we recommend that all accounts be set to “limited” access. Limited access provides anyone in the Hootsuite Enterprise system the ability to post on any Waterloo account. The account owner has the ability to approve, reject or reschedule the content.
Adding and Deleting a User

Adding members from your organization to your team gives those members the ability to help with tasks such as content management and user engagement.

Team admins can add or delete members to their teams. In the team screen click “Add a Member”.

Select the user you would like to add on the drop down menu. Once they are selected give them the desired permission level.

Removing a member from a team will prevent that member from accessing tasks for that team. This can be completed by an admin, team admin and super admin.

Only Super admins can add new members to the Hootsuite Enterprise system. For any changes to your seat distribution please contact the Manager, Social Media and Community Engagement at a2miller@uwaterloo.ca.
Tips for Using Hootsuite
Implementing Social Across the Student Lifecycle

Admissions: Recruiting the Brightest Future Students

Social media can be used to build relationships with prospective students and turning them into enrollment applicants.

- Engage with prospective students
  - Hashtags
  - Replies
- Drive traffic to application portals
  - Ow.ly links; use UTM codes to track data
Student Services: Strengthening Campus Culture Today

- Respond to on-campus issues in real time
  - Monitor student comments on multiple networks from your **Hootsuite dashboard**, to quickly detect potential trends or issues before they escalate.
  - **The Hootsuite Assignments** feature lets you assign messages to the appropriate team member to provide rapid responses. Share tasks with departments and colleges to access their resources and support their initiatives, for a fully integrated approach.

- Strengthen school spirit and campus culture
  - Hootsuite has many ways to gather intelligence on student opinions/sentiments, to help determine what, if any, steps need to be taken to enhance school spirit.
  - Integrate surveys/survey apps to get a detailed and current snapshot of student opinion.
  - Use **app integrations like Instagram** to find and share content generated by students and visitors about your school.

- Transition from students to alumni
  - Get students engaged early to maintain a connection with them after they graduate.
  - Draw students into niche social networks by supporting and enhancing the online activities of your school’s clubs, teams, and associations.

- Stay connected
  - Alumni have valuable insights into the student experience at your institution. Here are a few ways to help you keep in touch.
    - **Filter your search streams by keyword** to find conversations on a particular alumni topic, program, team, or graduating year.
    - Build a **Twitter list** for each graduating year, and add students who are sharing online to their appropriate list.
    - Use **hashtags** as catalysts for conversation, and to group posts by subject.