

**Introduction**

This workbook has been developed so that you are able to collect and present evidence that demonstrates your knowledge and skills in relation to the use of social media within a business.

There are different sections that make up this workbook in order to make sure you are able to complete all of the tasks necessary, but you will be provided with support as you move along by your Assessor.

Further learning materials and support is available through your studying membership of the Institute of Enterprise and Entrepreneurs. If you haven’t yet received your login, please speak to your Assessor who will be happy to sort this out for you.

This unit contains two learning outcomes and will support you to be able to:

* Understand the major social media channels
* Understand the specialist social media channels
* Understand how a business uses social media
* Understand the risks associated with using social media

The evidence within this workbook will be assessed by,

**Assessor Name:**

and will be quality assured by,

**Internal Quality Assurer Name:**

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**Introduction**

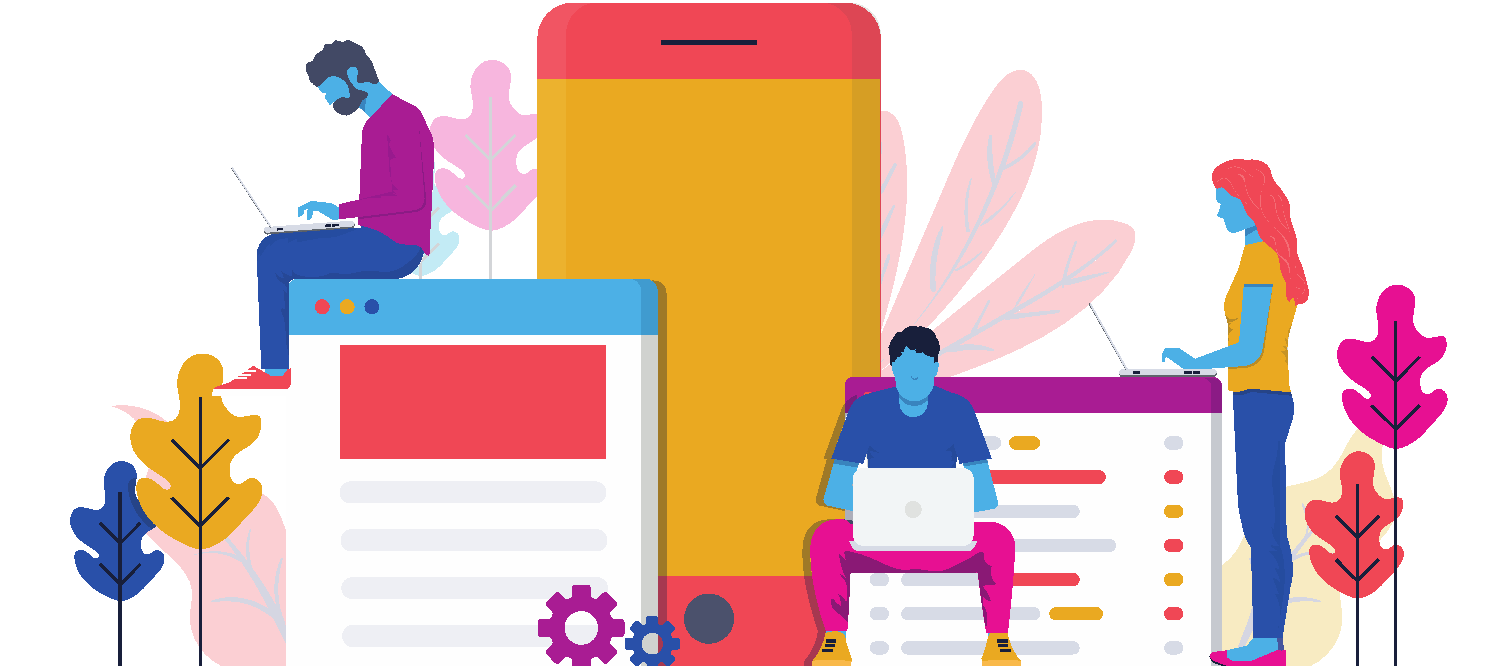
In the 21st century, social media is used everyday by millions of people, worldwide. With so many people using it, this could be a great way to advertise your business, spread news about some new products or engage with your audience, among other uses.

One of the most efficient methods of advertising your business may be using social media. Social media channels may allow you to reach a new or wider audience. But managing and setting up your social media channels is a job that requires regular work and dedicated time set aside just for that. You have to choose the right platform, know which audience you are writing for and know what content those people engage with. One demographic, or group of people, may prefer images more than text. Others may prefer a video, explaining how the products work. First, you will need to spend some time thinking of your target audience. Who are they? How will they interact with your business? What is it you are offering and how will you present this on social media?

Once you know all of this information, social media promotion is a really useful way to share your news and can produce some rather impressive results.

“Before committing to a social media platform to grow your business, have a clearly defined goal of what you want to achieve.” (Business.com, 2019).

From growing an audience to an increase in sales, social media has many uses within a business.



Your Assessor will support you to plan how best to demonstrate your knowledge and skills which may be through the completion of the activities within this workbook or may include additional tasks best suited to you.

If any additional tasks are to be completed these will be listed in the table below with target dates for which you should try your best to complete each task listed.

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| **Task** | **Target Date** | **Re-planned Target Date** |
| Completion of the activities included within this workbook |  |  |
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By signing below, you agree to completing the work as detailed above and working with your Assessor to achieve this by the deadlines indicated.

**Learner Name:**

**Signature:**

**Date:**

**Assessor Name:**

**Signature:**

**Date:**



**Activity One**

**But what social media channels are out there? Which one is right for you?**

Twitter, Facebook, Instagram and LinkedIn are amongst the most popular social media channels, for business people and casual users. With millions of accounts, pages and posts, these social media channels are a great way to engage with new and returning customers.

Let's take a look at just a few examples of how these channels could be used by your business.

**Twitter**

Twitter is a social media channel that uses a combination of text and images in their version of a post, called a tweet. Sending a tweet is a short and catchy way to engage your audience. With a cap on the amount of text you can share, this social media channel is for those who have short messages to get out to their customers or audience. This channel also works as a great way to share the latest news. Whilst this may be tricky to do, you have to capture an audience’s attention in 280 characters or less. This is a great channel to quickly spread the word about something. Because tweets are usually short, it is a great way to build up a steady following of people that are actually interested in your content. Each Twitter account will have a follower list and following list. When you follow someone, you will receive updates on their posts. You will be able to see who this account is following, send them private messages and mention them in tweets in an easier way. If someone follows you, they will receive updates on your content. Likewise, they will see who you follow, be able to send you private messages and be able to mention you in their tweets. An individual can follow a page, person or group and instantly see what they are posting. Alternatively, you may want to use the ‘Explore’ tab which will let you see what is trending and what content you may specifically enjoy.

* **Tweets:** Tweets allow you to spread your information with your followers in an accessible way. Tweets allow you to send out a public post that is capped to 280 characters. You can attach images, videos and GIFs. You can schedule your posts, so you can set up a string of content in advance. Twitter, like other social media platforms, runs on Hashtags. Hashtags are like categories. By using one, you will see your tweet among other people who are tweeting about the same thing.
* **Direct Messages:** Working in a more direct approach, Direct Messages are a more targeted way to advertise your goods or services to those who may be most interested in it. This method of advertising can produce more fruitful results, but you need to make sure the people receiving the messages actually want to receive them. If you target people who may not want to read the information, you may end up wasting time. This means you may end up wasting money.
* **Gif Posting:** Gifs are moving images, taken from videos or TV shows. Twitter allows you to attach a gif to your post. These can be used to emphasise what you are trying to say, be a visual reaction to a post or present a bit of fun and an informal persona on your feed.
* **Twitter Ads:** Twitter ads is Twitter's own advertising function. This allows you to promote your posts and boost that post's attention. This function does require payment, but if you are thinking of using a paid advertising platform, Twitter may be beneficial to you.
* **Twitter analytics:** Twitter analytics is a way to see how people are interacting with your content. You will be able to see how many people have seen your tweets. You will also be able to see how many people have interacted with your posts, and in what way.
* **Fleets:** A fleet is a disappearing tweet. After 24 hours, a fleet no longer shows on your profile. This may be useful for those posts that are time limited or are maybe not as closely connected to your brand. These work like Instagram stories and Facebook stories.

**Instagram**

Instagram is a visual social media channel used by companies to build a strong brand and share images of their products, services and behind the scenes. This social media channel is great for reaching those who engage with images rather than text. Instagram does give you a caption box, but the focus is really on the image.

This social media platform allows you to focus more on building up an image for your company or business so it could be useful to focus on this in the initial stages of your startup.

* **Posts:** Instagram posts are a great way to capture your audience's attention by using visual tools and eye-catching graphics. The image in the post should be specific and have a main focus, and your caption should be too. Your caption is just as valuable, if not more so, as your image. An image without a good caption is just an image.
* **Stories:** Stories provide a brief segment of information. This content disappears after 24 hours. It’s main use is to share information that your audience needs to know immediately, or provide a personal touch that may not be appropriate or fit in with your main feed. Stories are a great way to make your business more approachable and interactive. You can ask questions, allow others to ask your company questions and post more lively content to your stories.
* **Highlights:** Highlights are a collection of stories. Highlights are a useful way to keep your stories, if they are particularly useful or important. The highlights don't disappear and you're able to put them into categories. This way your audience is able to find all of the relevant content that may apply to them, in one easy to find place.
* **Private Messages:** Private message is a function within Instagram that allows you to directly, and privately, reach out to people and send them information. Private message allows you to specifically target people that you want to share content with. Whether it is a link to a website, a friendly hello or making that new important connection, a direct message could be a good way to spread the news about your business to specific people.

**Facebook**

Facebook is a social media platform for distributing news to friends and family. This platform operates more like a discussion page, where people post statuses and people react and comment on them. To see someone's content, you will likely have to be friends with them. This platform relies on both parties agreeing to talk. Someone sends a friend request and the other person accepts or declines this request. If accepted, both individuals will be able to see each other's content, as well as photos, friends lists and their about me sections.

* **Posts:** Facebook posts are a rather difficult thing to define. They are content that can be as long or as short as you want. They can feature images, they can be purely text based. You can hashtag and mention people or places to link up to them. Posts can be a good way to share information in an accessible form.
* **Messages:** Facebook messenger works in a similar way to Instagram private message, in that you can choose who to send messages to and what you want to share with them. Messenger is actually a separate app, but the app uses your Facebook friends and data to suggest who to message. This is a great way to share information with specific people. The reach for Facebook messenger is slightly restricted, because it runs off Facebook, which requires you to be friends with people. But if you have a relationship in which you can send them private messages, this shouldn't be an issue.
* **Facebook Live:** Facebook live is a streaming feature that Facebook hosts. This allows you to ‘go live’ and show your friends and family what you are doing right now. With the feature allowing your audience to chat back to you, this is a great way to start an instant chat whilst also providing the live visual element. In terms of business use, this feature may be useful for the unveiling of a product, for a quick Q&A (Question and Answer) session or if you need to instantly get feedback on or share news about something.

**LinkedIn**

Similar to Facebook, but wearing a business suit, LinkedIn is a networking channel for professionals. This platform provides business people and companies a space to share industry news, updates about their company and advertise to like-minded people, targeting professionals specifically. This provides B2B contact, which means business to business. LinkedIn isn’t a place to share what you had for your lunch or where you're off to on your honeymoon, LinkedIn is a place made for business. LinkedIn works primarily with posts. There is an option to send direct messages, but similarly to the other networks, this only works with people who have consented to receiving messages and have expressed an interest in your business.

Similarly to the other platforms, you are able to post updates, send direct messages and connect with people around the world.

Using the table below, highlight the main social media channels that you think businesses use to engage with their customers and the wider marketplace, the reason they use each of the channels and the main differences between the channels and the alternatives.

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| **Social Media Channel** | **Reasons a business would use this channel** | **Difference between this channel and its rivals** |
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**Activity Two**

The earlier mentioned social media channels are great at allowing you to reach an audience, but they may not allow you to create the content you want to create or to be as creative. As well as the mainstream social media channels, there are also specialist channels that you can use.

TikTok, YouTube, Pinterest and SoundCloud provide a more specialised, and sometimes creative, experience. And creativity does not detract from the success of the social media channels. These platforms are amongst the most popular social media platforms.

**TikTok**

TikTok is an up and coming app which will be useful to most business owners. This platform has gained a huge following and is still growing. The focus for this platform is on the younger generation. These short videos often follow a ‘challenge’ structure. These include songs, voice overs or dances. For business use, these can be used to present the personality of the company. It is wise to use TikTok in a way that will not be jarring. If you upload a serious business advert to TikTok, it will probably clash with people’s feed. Posting funny and energetic content can help build up an audience. You may need to be smarter about how you mention your business, but this could produce some amazing results with some TikToks having millions of views, if not billions.

**YouTube**

YouTube allows you to post short form content as well as longer videos. This content is usually more engaging, as people tend to engage with images or visual media more than text.

* Shorts: YouTube shorts are 60 second long pieces of content, ideal for showcasing a new product or service you can offer, but also allow you to add a real personal touch. YouTube shorts should be short and eye-catching pieces of content.
* Upload: A YouTube upload can be anything from a 6 second clip to a longer video. These are great for showing how something works, introducing your business or discussing a topic in more detail. YouTube uploads can be a great way to put content out that really goes into detail about your business. This is one of the longest forms of content you will be able to produce, other than written content on your website. It is a really useful source of traffic and engagement if you have something topical or a conversation with depth.

**Pinterest**

Pinterest is maybe one of the trickier platforms to operate. This is a mood board social media channel. This platform allows you to compile boards, or collages of certain items, images or topics. These boards and collages are usually categorised and allow you to have a streamlined and clear workspace. You can use Pinterest to advertise products you have made, share graphics or pictures of your products or services.

**SoundCloud**

If your product or service is something like business support, counselling or a service that requires speech, SoundCloud could be useful for you. This programme lets you upload audio files to the internet and then share this with your audience. SoundCloud is pretty straight forward, in that you simply create content or listen to content. This could be a useful platform for advertising services you may offer.

Using the table below, highlight the main specialist social media channels, e.g. CheckATrade, that you think businesses use to engage with their customers and the wider marketplace, the reason they use each of the channels and the main differences between the channels and the alternatives.

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| **Social Media Channel** | **Reasons a business would use this channel** | **Difference between this channel and its rivals** |
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**Activity Three**

Social media isn’t only used for marketing. Social media is a useful tool for market research, customer service, collaboration, sharing news externally as well as internally and a way of gaining sales (ISCOOP). It really is a useful tool for many departments across most businesses. Let’s discuss a few uses of social media in more detail.

**Market Research**

One use for social media is Market Research. By using your social media analytics, you can see who is engaging with your content and, in some cases, who is skipping past it. This can help inform your decision on which platforms to use and which ones you may want to avoid. Platforms like Instagram, Facebook and Twitter allow you to see how many people interact with your content, how many scroll past and how many interact with it. This information can inform your future use of these platforms. You may choose to use targeted advertisements, or ads, based on this information.

By using targeted ads, you can choose who you want to target and also narrow your adverts down to age, gender, location and interests. You may need to advertise your dog grooming business. So you can choose to advertise it to people interested in dogs, pet welfare and dog competitions. You can choose a certain age range and gender demographic and then you will target those who will be most likely to actually interact with your business.

**Customer Service**

Interacting with your audience on social media can be a great way to deliver casual, but top level, customer service. By giving your audience that personal customer service, they may be more likely to buy from you in the future. By noticing that you are personable and not a robotic corporation, they may be more likely to choose you over your competition. You can also. Secretly, advertise your company without knowing it. Interacting with an audience, be it yours or someone else's. Is still getting your company name out there. So using Twitter or Instagram to attract attention and raise sales is a brilliant idea. But to get those sales you will have to give great customer service.

Some customers may also choose to leave comments on your posts, ask you questions or may start discussions on your social media posts. This is a great time to interact, answer questions or get involved in those discussions as a business.

**Sales**

Social media is a great way to raise your sales numbers. Whether it be that you offer promotional discounts. You may actually advertise your products on social media, if you have any services or goods that could be sold that way. If you are more of a service based company, then selling on social media could mean uploading monetised tutorials, providing distanced services or quotations for peoples tasks.

**News**

Social media is perfect for sharing news. You can share news on your latest products, your new employees or your next venture. You can also choose whether to share the news internally or externally. Some social media channels, like Facebook or LinkedIn could be useful for sharing internal news updates. Allowing your employees to comment on these posts could boost morale. With a group discussion going, you would be able to nurture a positive working environment and this would hopefully make your workplace more efficient.

**Collaboration**

One of the basic uses for social media is collaboration. Whether you’re sharing your news, updating your customers or providing a personality for your brand, this will all come through some collaboration. Interactions, conversations and engagement are all part of this collaboration. Of course some collaborations may require some people to actually work together on content, even the smallest of interactions can help out your business, and all through social media. Even collaborating with your own team internally could lead to better efficiency. More efficient means more work, more work means more income (hopefully). So collaborating over social media could have an indirect effect on the success of your business.

**Reviews**

Social media is also a good way to ask your customers to leave a review. Whether it is an official Facebook review, an informal comment left on Twitter or some photos uploaded to Instagram with people's thoughts, this is where your customers start working for you… for free. A customer review is a really useful way of building up a reputation, and this could increase your sales. If a customer can see that someone else enjoyed your product or services, they are more likely to purchase it themselves. A customer review speaks louder than your own advertising, so getting those reviews from customers is really important. And what better way to show this off than on your public social media profiles.

**Entertaining**

And one of the final reasons to use social media is to have fun. Your business may be very professional, but applying that personality to your brand is a really important step in allowing your customers to connect with you. If your audience feels alienated or put off by your formal nature, you could be missing out on all of those vital sales. It also allows you to shape your brand in whatever way you think is appropriate. Sometimes it wouldn’t fit, to have a long speech about the nature of your site. Posting a funny bloopers image, or an informal chat on your Instagram live would be a great way to outline your business or raise some informal news with your audience.

If you want to know how attractive your social content has been, you can have a look at your analytics. Some platforms, such as Twitter, Facebook and YouTube, allow you to look at who has interacted with your content and in what ways. So make sure that you spend some time figuring out who is looking at your content. This will help you understand your audience more and allow you to focus your use of social media, and any form of advertising, in the future. You could also ask a question, when someone completes an enquiry form, such as “where did you hear about us?” This would let you know how people have come across your business and if it is through social media, you could list various options for them to choose from. Again this is a useful tool to know which social media channels are working the best for you and which ones are a bit useless for your business.

**Challenges and risks**

Using social media in your business does come with risks and challenges. Whether it is your audience manipulating what you say, your team not being trained in social media, or just missing the mark with your marketing strategy, with the power of social media, comes the responsibility to use it correctly. Let's take a look at some of the ways social media can present risks and challenges to your business. We will also look at how to overcome these challenges, so your business can use social media, one of the biggest free marketing platforms, safely and securely.

* **Audience reaction:** Potentially one of the more difficult things to predict, your audience's reaction to your posts may get you in some trouble. Some users of social media take content and make memes (internet jokes) or simply reshare without thinking. This can sometimes cause difficult situations or lead to bad publicity. To overcome this risk, you should always have some terms and conditions in place that reduce your liability in terms of social media usage. Providing your audience with a written document (whether it is a formal write up on your site, or an informal tweet asking people to be thoughtful and conscious) helps diffuse the situation. By reducing your connection with negative comments or reshares from unrelated accounts, you are able to distance yourself from the bad reputation this may bring to you. Also engaging with the positive comments, and ignoring the negative ones (or even reporting them to the social media platform) is a great way to show your audience that by being nice, they may get their question answered.
* **Staff usage of social media:** This risk is a two-pronged issue. Firstly, your staff may have personal social media accounts that may have content that does not align with your brand or business ethos. Make sure your staff are only posting appropriate content on their personal accounts. They should also not act on behalf of the company on their personal accounts, unless they have been asked to do so. So ensuring that there is a distance between the employees online personality and the company’s social media, is really important here.

The second issue is those who need to use the company social media as part of their job will need to be trained to do so. If your staff members are not trained in social media etiquette, customer service, complaints handling and social media copywriting, then your social media accounts could become a minefield of issues. This could be the posting of offensive content, escalating arguments in the Facebook comments section, or sharing links to incorrect websites or third parties. It is important that your team knows how to use social media, effectively, efficiently and safely. Your business, and its reputation, depend on your team's online presence. So making sure it is a positive one, could be make or break for your business. Wasting time on marketing to the wrong audience: As mentioned earlier, each social media channel has their own audience and its own use. It is really important to keep this in mind when spending time on your social media marketing strategy. If you invest a lot of time, money and effort into your social media usage, and it doesn't have a successful pay off, you may put your business in trouble. Not only is social media time consuming, and a job role in its own way, it also has knock on effects on your business.

It is important to check when you are mentioned on social media. Sometimes, accounts will share or mention your account for a few reasons. Firstly, to grow their own reach by associating with your business. They may also be approaching you to collaborate, or they may be trying to tap into your pool of customers. Here are some things to look out for when you are mentioned on social media.

* Is this person a well known individual in your field? It is really important that everyone on your social media channels is appropriate and valuable. If you are followed by people who may be deemed inappropriate for your business, controversial or to be not valuable, it may affect the perception of your business. If your followers list is full of people with nothing in common with your industry / not your customers, people may be put off using your company.

Sometimes, you may be mentioned by an industry professional or a role model. This is a great time to engage with someone, who may have a lot of experience in the field. This would be a good time to reply, ask a question or just reach out and thank them for the mention. If an industry professional has mentioned you online, this will increase your impact and could lead to increased traffic for you.

* Are you being mentioned in a positive way? Some people may mention you in a way that could damage your reputation. Whether it is tagging you in an inappropriate joke, mentioning you in a negative review or just simply lying about your business. It is important that you know when someone has done this. That way you can get ahead of the issues before they begin. You can either engage with this post to diffuse the situation, or you could report it to the social media channel (most have a report button) and see if the post can be removed. Sometimes people will mention you with a positive review, they may leave a comment about how good your customer service was or they may review your product. This is equally important to recognise and it is a brilliant time to interact with your customers.
* Indirect mentions. Sometimes, a person may mention you without actually mentioning you. They could say your employees name, a certain product you have the rights to, a location or even a vague description of your shop. This sort of mention requires a bit of detective work, but by searching on your social media channels for specific things, you will be able to find these mentions and engage with the information.

There are many more issues attached to social media, some useful resources can be found at the end of this booklet.

Acknowledging and taking responsibility for each time you have been mentioned could be included in your social media policy document.

**Social Media Policy**

A social media policy allows you to remain in control of your business’s social media policy. This document usually outlines your company's use of social media, your own set of boundaries and it can also help you set up your company's tone of voice. A social media policy allows you to protect your reputation.

“The reputation of the company is certainly one of the most important things that matter for the company's success. Well, with the help of a proper social media policy, your employees will have an idea about what to post about the company on the profiles of their social media accounts” (Marketing91.com).

A breakdown of what goes into a social media policy document is as follows:

* What is the purpose of your company's social media policy?
* Who owns your social media channels? Is it a company account or a personal account?
* Be human - outline the human approach to social media use.
* Difference of opinion and how to mediate this difference / diffuse heightened situations.
* Who owns the devices that you use, and who has access to them?
* Who maintains these devices and who maintains the websites / channels?

By having these rules and guidelines, you protect the reputation of the company you are working to build up, as well as making sure all of that time has not been wasted. Your employees will be more aware of what they are and are not allowed to post on their social media channels.

A social media policy document also allows you to escape some pressing legal issues. Be that someone being dismissed for their use of social media and suing you, or an employee saying they didn’t know they couldn't do something on social media. You will be able to outline, in a legal situation, that you have provided all of the relevant information the employee needs to complete their job and do it in a safe manner. This way you have covered the business for any liability, and provided your staff with enough knowledge on how the business operates, to be able to do so safely and securely.

Social media can be time consuming and expensive for a business to use as well as introducing other challenges that need to be addressed so why bother? What difference does it make to a business?

Using the boxes below explain:

* Why a business would use social media
* How social media supports a business to interact with those internal and external to the business
* How an online community can help with interaction with those internal and external to the business
* How a business can monitor how successful engagement has been using social media
* The challenges and risks to a business associated with using social media
* The ways they could overcome the challenges and risks associated with using social media
* The importance of a business being aware of when they are mentioned on social media
* Why a business should have a social media policy

Why would a business use social media?

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How does using social media help a business to engage with those internal and external to the business?

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What is an online community and how can it help with engagement with those internal and external to the business?

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What tools can a business use to monitor how successful engagement has been using social media?

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What are the challenges or risks that a business may encounter through using social media and what methods could they use to overcome these?

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| **Challenge or risk to a business of using social media** | **Methods of overcoming the challenge or risk** |
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Why is it important for a business to be aware of when they have been mentioned on social media?

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What is a social media policy and what types of information would you normally find within one?

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Why is it important for a business to have a social media policy?

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**Activity Mapping**

Now you have completed the activities to demonstrate your knowledge and skills it is time for your Assessor to map your work against the standards listed below.

By doing this they will be making sure that the work you have provided by completing the activities meets the requirements for you to gain your certificate.

Your Assessor will provide you with feedback on how you have done and whether any more work may be required.

|  |  |  |
| --- | --- | --- |
| **Assessment Criterion – The Leaner can:** | **Activity Number or Reference Number of Additional Activities:** | **Assessor Signed Off (✓/✗):** |
| State the major social media channels | 1 |  |
| Identify reasons for using each of the major social media channels for business use | 1 |  |
| State the main differences between the major social media channels | 1 |  |
| State the specialist social media channels | 2 |  |
| Identify reasons for using each of the specialist social media channels for business use | 2 |  |
| State the main differences between the specialist  social media channels | 2 |  |
| Identify why a business uses social media | 3 |  |
| Explain the advantages of a business building an online community | 3 |  |
| Describe why a business should be aware when they are mentioned in social media | 3 |  |
| State the benefits of a business using social media for  engagement | 3 |  |
| Identify ways of monitoring social media engagement | 3 |  |
| **Assessment Criterion – The Leaner can:** | **Activity Number or Reference Number of Additional Activities:** | **Assessor Signed Off (✓/✗):** |
| Identify risks associated with using social media for business use | 3 |  |
| Explain why a business should have a social media policy | 3 |  |

**Assessor Feedback**

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**Authenticity Declarations**

**Learner Declaration**

By signing this declaration, you agree that the evidence provided within this workbook has been produced by you and meets the requirements of being authentic, sufficient, valid and current to the standards required.

**Learner Signature:**

**Date:**

**Assessor Declaration**

By signing this declaration, you agree that you have assessed all of the evidence produced within this workbook and have ensured that the work is that of the learner. You are also declaring that during the learning process you have ensured that the evidence is authentic, sufficient, valid and current to the standards required.

**Assessor Signature:**

**Date:**

**IQA Signature (if applicable):**

**Date:**

**Additional Evidence Forms**

Use these additional forms in order to record additional evidence for the activities within this workbook where additional space is required.

Ensure that each piece of evidence entered on these forms is clearly labelled with the corresponding activity number.

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**References & Useful Resources**

**References:**

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