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Guidelines for live streaming marketing service

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Foreword

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The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular, the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see www.iso.org/patents).

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For an explanation of the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT), see www.iso.org/iso/foreword.html.

International Workshop Agreement IWA 41 was approved at a series of workshops hosted by the Standardization Administration of China (SAC), in association with China Council for the Promotion of International Trade Commercial Sub-Council (CCPIT-CSC), held virtually between April 2022 and May 2023.

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at www.iso.org/members.html.

Introduction

The digital economy continues to prosper, and marketing continues to shift from traditional to digital. Digital marketing is an important complement to traditional marketing communication such as television, radio, and print advertising. With its excellent ability to target the right consumer groups and the possibility to interact with them, digital marketing is developing as an integral part of today's marketing communication. Live streaming marketing, a very popular tool that companies use to achieve digital marketing goals, has evolved from a trendy phenomenon into a full-blown marketing strategy used by brands and businesses in nearly every industry. Estimates show that around 91 million subscribers will utilize live streaming by 2024.

This document aims to meet the growing consumer demand, help companies use live streaming as a marketing tool to facilitate online business, as well as provide suggestions for companies to collect or recruit live streaming marketing talents. When the audience can obtain a transparent and truthful buying experience during the live streaming marketing process, companies successfully build brand trust. With this, a live streaming marketing service model can be established on a global scale.

This document contains the common terms and definitions, service process, recommendations for live streaming marketing participants, service provision, as well as continuous improvement. It is based on good practice from the digital marketing sector.

This document focuses on live streaming marketing services in the digital marketing sector. It is suitable for live streaming marketing service parties such as live stream hosts, live streaming marketing platforms, multi-channel network agencies (MCNs) and other participants.

This document is committed to implementing the United Nations Sustainable Development Goals: SDG 1-"No poverty", SDG 5-"Gender equality", SDG 8-"Decent work and economic growth", SDG 9-"Industry, innovation and infrastructure", SDG 11-"Sustainable cities and communities" and SDG 12-"Responsible consumption and production".

Guidelines for live streaming marketing service

1 Scope

This document provides guidelines for the service process and operations management of live streaming host, live streaming marketing platform, live streaming marketer, and multi-channel network agency (MCN agency) in the process of carrying out live streaming marketing services. This document is applicable to the parties involved in live streaming marketing services.

This document does not cover information technology (IT) requirements, specifically excluding:

— information security, cybersecurity, and privacy protection;

— coding of audio, picture, multimedia, and hypermedia information;

— IT service management and IT governance.

2 Normative references

There are no normative references in this document.

3 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

ISO and IEC maintain terminology databases for use in standardization at the following addresses:

— ISO Online browsing platform: available at https://www.iso.org/obp

— IEC Electropedia: available at https://www.electropedia.org/

3.1
live streaming
way/channel that uses network technology or streaming media technology to broadcast the streamed video over the internet in real-time without first being recorded and stored

3.2
live streaming marketing
activity or mode of marketing products, including goods and services, to reach consumers or businesses by using *live streaming* (3.1) as a kind of digital channel

3.3
live streaming marketing platform
network information system that provides participants with necessary functions to facilitate and promote *live streaming marketing* (3.2)

3.4
live streaming host
person or character issued from AI with marketing skills that conducts *live streaming marketing* (3.2) on the *live streaming marketing platform* (3.3) through an internet-enabled device

Note 1 to entry: The device can include a smartphone or tablet, or portable device with similar information technology functions.

Note 2 to entry: Artificial intelligence (AI) is the ability of a digital computer or computer-controlled robot to perform tasks commonly associated with intelligent beings.

3.5
live room
online or virtual room, available within a certain period, for the *live streaming host* (3.4) to interact with and market to the audience

3.6
live streaming marketer
person or group of persons with assigned responsibility, including product selection, planning and preparation, promotion, and customer service to successfully promote and complete *live streaming marketing* (3.2)

3.7
cross-border live streaming marketing
activity of marketing products of one country or jurisdiction with the consumers or businesses in another country or jurisdiction through or by the means of *live streaming marketing* (3.2), with or without the help of international logistics or overseas warehouses

3.8
multi-channel network agency
MCN agency
organization that recruits and cultivates the *live streaming host* (3.4) and the *live streaming marketer* (3.6), and provides them with a series of services for marketing preparation and promotion

3.9
audience
person or group of persons who enters the *live room* (3.5), watches *live streaming marketing* (3.2), and is interested in or is likely to buy products

4   General principles

4.1   General

In order to provide an efficient live streaming marketing service, the following five principles should be abided by parties involved in live streaming marketing services.

4.2   Credibility

The service process of live streaming marketing established by and marketing information exposed within live streaming marketing platforms should be real and credible.

4.3   Compliance

All activities and actions involved in live streaming marketing should consider the relevant and applicable legislation and laws, and be aware of the protection of intellectual property rights.

4.4   Integration

The whole service process should be integrated and established to ensure the realization and quality of the live streaming marketing service.

4.5   Capability

Live streaming marketing platforms should have the capability to provide services to make sure the live streaming marketing can be conducted smoothly and successfully.

4.6 Customization

Services for live streaming marketing should be customized by fully considering and meeting the needs and demands of the live streaming marketing participants.

5 Service process

5.1 Account creation and operation

5.1.1 General

Live streaming marketing platforms should allow live streaming marketers, live streaming hosts, and the audience to create and operate accounts to conduct or participate in live streaming marketing.

5.1.2 Account creation

The process of account creation should be defined and provide clear instructions for account creators. During the process of account creation, the live streaming marketing platforms should:

a) adhere to the principle of necessity to collect applicants' registration information;

b) inform the account creators and clearly detail the terms of service in the website before they submit the final information;

c) establish a robust mechanism for the registration and response to the registration quickly;

d) provide feedback functions and relevant contact information in the website in case the account creators encounter problems.

5.1.3 Account operation

The process of account operation should be defined and provide clear instructions, including replacements and edits on the profile photo, name, gender, region. Accounts can be operated and increased in activity through:

a) daily check-in;

b) daily video production and promotion;

c) interactions with other accounts, including Like, Comment, Forward, etc., within the platform.

Live streaming marketing platforms should display and update the relevant information on account owners on their pages, including the number of online days, the positive rating, and the number of live streaming marketing events. Live streaming marketing platforms should set up corresponding incentive mechanisms to increase account activity and participation.

5.2 Live room created

The live room is created by an account owned by a live streaming host or live streaming marketer before they conduct live streaming marketing. The necessary information when scheduling a live streaming marketing event includes but is not limited to:

a) the title of the specific live streaming marketing event;

b) the duration of the specific live streaming marketing event;

c) the relevant keywords and hashtags (#) of the specific live streaming marketing event;

d) the cover and descriptions of the specific live streaming marketing event;

e) the screen orientation during live streaming marketing, including landscape and portrait;

f) the selection of live streaming software, obtaining the corresponding push URL.

For cross-border live streaming marketing, the virtual room when created should have such tools as for setting language and region.

If the live streaming host is in fact a digital character, it should be driven by real people and pass identity verification, and it should report to the live streaming marketing platform and get permission before carrying out live streaming events.

Live streaming marketing platforms automatically generate information link and page showing upcoming live streaming marketing events after the information for creating a live room is submitted and verified. The information is allowed to be modified afterward but before the beginning of live streaming marketing events if proposed by an account.

The live room is available for the account created to enter anytime to set live streaming marketing environment while unavailable for other accounts.

5.3 Warm-up and promotion of live streaming marketing

To facilitate the promotion of live streaming marketing events, live streaming marketing platforms should develop systems and corresponding pages to display all upcoming live streaming marketing events and contain a search engine by indicating account names, dates, hashtags (#), keywords, and titles to let accounts get relevant marketing event outcomes.

Live streaming marketing platforms should proactively push live streaming marketing event information to other accounts based on accounts' activity.

The live room propaganda link and page are allowed to be copied, shared and clicked within the platform and in other social media sites for further promoting.

Live streaming marketing platforms should provide external marketing and promotion channels for accounts to warm up the events and target more audiences.

5.4 Live streaming marketing in progress

Live streaming marketing starts when the audience are permitted to enter the live room by clicking given propaganda links and pages at the scheduled time.

The live room displayed to the audience should be attractive and give easy access to the functions. When live streaming marketing is in progress, the live room should clearly display the following relevant information:

a) the account information created by the live streaming host or the live streaming marketer;

b) views in the live room;

c) product images and necessary information;

d) the link to the order and payment portal;

e) chat box and emoji.

NOTE   The link to the order and payment portal is the link intended to point to the page containing detailed product information and the payment portal.

Live streaming hosts market the goods and services as intended and in the script, interact with the audience to build trust, tell the audience to buy the products by clicking the "Buy Now" button, and pay for them to finish the marketing.

An online payment system for the audience should be established by live streaming marketing platforms. An electronic payment service should be provided by banks or qualified non-financial payment institutions.

Live streaming marketing platforms should make sure the function of chat box and emoji work during the process and are available for live streaming hosts and audience to use for interaction.

5.5 Live streaming marketing completed

Live streaming marketing is ended when all activities and actions of the live streaming marketing have been completed and the live room is closed. Live streaming marketing platforms should provide recording and replay services after the live room is closed and generate related live streaming marketing statistical data.

Live streaming marketing platforms should protect the ownership of the video of live streaming marketing team and do not disclose or edit the video for other purposes.

Live streaming marketing platforms should cooperate with third parties to establish a logistics storage service mechanism to provide supply chain solutions brought by the sales of live streaming marketing and update logistics and acceptance of products in real-time, and provide after-sale service to deal with complaints from the audience. For cross-border live streaming marketing, cross-border logistics storage service is needed.

5.6 Account logout

Live streaming marketing platforms should establish an exit mechanism to deal with the requests from the accounts and have clear instructions for them.

Live streaming marketing platforms should allow live streaming marketers, live streaming hosts, and the audience to permanently log out of their accounts on a voluntary basis and delete the related information and data generated.

Live streaming marketing platforms should settle account balances and account assets with the accounts during the exit process.

Live streaming marketing platforms should compel accounts that fail to comply with the terms of service or that violate the marketing code of conduct to exit.

6 Operation management of live streaming marketing participants

6.1 Live streaming host

During live streaming marketing, the live streaming host, including the influencer, should:

a) provide real and effective identity certificates and other useful and necessary information when creating an account within live streaming marketing platforms;

b) meet the applicable age-related restrictions and other requirements;

c) receive training on live streaming marketing and obtain necessary certificate of competence, or other supporting materials to prove adequate marketing experience;

d) dress appropriately, if they appear in the live room;

e) create a good marketing and interactive atmosphere in the live room;

f) make sure the marketing words and deeds delivered and shown are decent, proper, and suitable;

g) not sell fake and inferior products and be responsible for the quality of the products being marketed;

h) be aware of or sensitive to the differences in religion, culture, and customs of the consumers, for cross-border live streaming marketing;

i) ensure the smooth progress of the live streaming marketing and complete it within the planned time;

j) identify and consider the relevant and applicable legislation and laws, and intellectual property rights when using a digital character to perform live streaming marketing.

6.2 Live streaming marketing platform

During live streaming marketing, the live streaming marketing platform should:

a) provide corresponding business licenses which can be easily found within live streaming marketing platforms;

b) possess enough technical and service ability of the software and hardware to ensure the success of the live streaming marketing, including the technical ability to realize green screen and virtual reality (VR) live streaming, and promote eco-friendly delivery;

NOTE Virtual reality (VR) is the use of computer modelling and simulation that enables a person to interact with an artificial three-dimensional (3-D) visual or other sensory environment.

c) establish effective mechanisms related to entry and exit procedures, information security protection, complaint and dispute handling, emergency management, etc;

d) develop a catalogue of restricted and prohibited goods and services for live streaming marketing and publicize it within live streaming marketing platforms;

e) develop and publicize relevant management rules of live streaming marketing and update them if necessary;

f) be capable of monitoring the live rooms and the deeds and words of live streaming hosts, detect the unusual traffic in live rooms, and shut down live rooms in case of an emergency;

g) play a positive role in live streaming marketing, be aware of the relevant laws and accept public scrutiny.

6.3 Live streaming marketer

The live streaming marketer should:

a) receive training on live streaming marketing and have adequate marketing experience;

b) possess technical equipment and staff for live marketing services;

c) fulfil the competence listed in Annex A.

6.4 MCN agency

The MCN agency should have corresponding business licenses to get into the live streaming marketing industry.

The MCN agency should establish a standard system to recruit, train and cultivate live streaming hosts and live streaming marketers to provide high-quality live streaming marketing.

When providing supply chain services, the MCN agency should establish supply chain management to coordinate and manage production, inventory, logistics, sales, and other processes to ensure the quality and efficiency of supply chain services.

The MCN agency should establish a qualified mechanism when providing quality assurance service for live streaming marketer, including product selection, product approval, marketing, end marketing and report the product quality transparently.

The MCN agency should establish marketing and promoting plans and implement the plans for live streaming marketer in the process of warm-up and promotion of live streaming marketing.

The MCN agency should be responsible for live streaming studio construction, and offer a professional studio set-up custom based on products marketed, including a studio space, production equipment, studio design, construction crew.

The MCN agency should cooperate with live streaming marketing platform operators, conduct consumer satisfaction surveys on live streaming hosts and products in order to improve services.

The MCN agency should protect and avoid disclosure of business secrets and non-public business information.

7 Review and assessment

The live streaming marketing platform should establish an efficient mechanism to review all live streaming marketing actions and activities, including but not limited to:

a) authenticity of information during account creation and registration;

b) appropriateness of deeds and words, dresses of live streaming hosts during live streaming marketing events;

c) orderliness and the appropriate manner of interaction in live rooms;

d) authenticity and quality of the services provided by other cooperated third parties;

e) any other necessary processes that may impact the quality and success of live streaming marketing services.

The live streaming marketing platform should establish an efficient mechanism to assess the quality of live streaming marketing actions and activities.

8 Continuous improvement

8.1 Service evaluation

The live streaming marketing platform should provide online service evaluation collection channels for live streaming marketing participants. The evaluation contents should include, but is not be limited to, the following:

a) live streaming marketing service processes;

b) services provided by live streaming marketing platforms and cooperated third parties;

c) any other necessary evaluation contents of accounts.

The live streaming marketing platform should provide effective channels for complaints and appeals to account owners and the live streaming marketing teams.

8.2 Service improvement

The live streaming marketing platform should regularly collect evaluation information from live streaming marketers and establish an effective solution mechanism for dealing with the issues that are raised.

Annex A
(informative)

Competence for the live streaming marketer

According to the different processes and stages of live streaming marketing, the competence for the live streaming marketer is classified into six domains with specific responsibilities that are outlined in Table A.1.

Table A.1 — Competence for the live streaming marketer

Domain	Tasks	Responsibilities
A.1 Product selection	A.1.1 Product trend and conversion rate analysis	A.1.1.1 Conduct market research to classify products, collect and analyse product data.
		A.1.1.2 Track product development trends, predict product changes, anticipate hot-selling products, and create hot-selling products.
		A.1.1.3 Summarize the reasons for changes in product conversion rates, forecast product conversion rates, and calculate and improve product conversion rates.
	A.1.2 Product quality and price analysis	A.1.2.1 Perform analysis of product characteristics, master the parameter requirements related to products, and establish quality control requirements of products.
		A.1.2.2 Learn about the relevant standards of products and analyse product quality.
		A.1.2.3 Perform analysis of product costs, identify factors that influence pricing, and determine product prices.
	A.1.3 Competitive analysis	A.1.3.1 Learn about the types of competitive products, collect and analyse competitor information, and develop competitor analysis reports.
		A.1.3.2 Track competitor information and optimize competitor analysis reports.
		A.1.3.3 Compare competitors with selected products and formulate product sales strategies.

Table A.1 *(continued)*

Domain	Tasks	Responsibilities
A.2 Planning and preparation	**A.2.1 Refinement of product selling points**	A.2.1.1 Collect and organize information about product selling points, refine key selling points of the product.
		A.2.1.2 Write sales copy based on the product selling points.
		A.2.1.3 Provide suggestions for product optimization and recommendations for product sales strategies based on the product selling points.
	A.2.2 Script planning	A.2.2.1 Collect script materials based on the theme of live streaming marketing, propose and optimize the theme of live streaming marketing.
		A.2.2.2 Create live streaming scripts, including outlines and copies.
		A.2.2.3 Optimize the live streaming marketing process based on the live streaming script and develop contingency plans for unexpected events during the live streaming.
	A.2.3 Scene planning	A.2.3.1 Create a live streaming atmosphere related to the theme of live streaming marketing, plan interactive scenes for live streaming marketing.
		A.2.3.2 Make appropriate use of props based on the features of the product and create marketing scenes based on the product selling points.
		A.2.3.3 Incorporate the product into the live streaming marketing scenes.

Table A.1 *(continued)*

Domain	Tasks	Responsibilities
A.3 Promotion and operation	**A.3.1 Live streaming marketing platforms selection and use**	A.3.1.1 Be able to use various functions of common live streaming marketing platforms proficiently and be able to use auxiliary software of live streaming marketing platforms proficiently.
		A.3.1.2 Select suitable live streaming marketing platforms and schedule live streaming marketing activities.
	A.3.2 Traffic increase	A.3.2.1 Be able to release live streaming previews, conduct live marketing preheating, and guide fans in the live room to promote.
		A.3.2.2 Learn about the channels for increase traffic in live streaming marketing and choose appropriate methods based on the situation.
	A.3.3 Product operation	A.3.3.1 Establish a basic information database for live streaming products, follow up the shooting of the product according to the shooting specifications, follow up the description of the product detail page, and ensure the accuracy of the descriptions of product detail pages, including price and categories.
		A.3.3.2 Collect feedback and demands from fans regarding products, predict product sales trends, and manage the onboarding and delisting of live streaming products.
		A.3.3.3 Conduct regular product knowledge training.
	A.3.4 Event promotion	A.3.4.1 Prepare operational plans for live streaming marketing events, establish an operational system for them, including themes, topics, and trends.
		A.3.4.2 Plan and organize live streaming marketing events, implement plans of live streaming marketing events, and adjust and optimize them based on market dynamics.
		A.3.4.3 Carry out pre and post-event promotion activities for live streaming marketing events, including the design of promotional materials such as offline posters, online promotion copywriting.
A.4 Data analysis	**A.4.1 Product data analysis**	A.4.1.1 Collect browsing data of products during the live streaming and analyse product conversion rates.
		A.4.1.2 Collect product return and exchange data and analyse the reasons for returns and exchanges.
		A.4.1.3 Develop product data analysis reports and provide recommendations for live streaming marketing activities optimization.

Table A.1 *(continued)*

Domain	Tasks	Responsibilities
	A.4.2 Fan data analysis	A.4.2.1 Collect and analyse data on fans' behaviours during the live streaming marketing and other indicators, e.g. fans increase data, fans stay time, interaction data, and repeated entries in the live room.
		A.4.2.2 Collect and analyse data on fans' live streaming transactions, e.g. product click-through exposure rate, click-through payment rate, and return rate.
		A.4.2.3 Develop fan data analysis reports and provide recommendations for live streaming marketing activities optimization.
A5 Fan engagement and management	**A.5.1 Fan engagement development**	A.5.1.1 Organize and implement activities to enhance fan engagement.
		A.5.1.2 Evaluate the effectiveness of fan engagement and develop plans for improve fan satisfaction and loyalty.
	A.5.2 Fan management	A.5.2.1 Effectively communicate with fans, track their activity.
		A.5.2.2 Classify and cultivate fans in the long term.
A.6 Customer service	**A.6.1 Product sales service**	A.6.1.1 Familiarize with price, features and other basic information of products, and be able to solve the problems of the audience.
		A.6.1.2 Know about product return and exchange service process, to ensure the smooth completion of return and exchange service.
		A.6.1.3 Introduce product discounts, points exchange and other preferential information and promotional activities to users accurately, which can help users enjoy preferential information and participate in promotional activities.
	A.6.2 Complaints and feedback handling	A.6.2.1 Familiarize with the customer complaint and feedback handling process and promptly address complaints and feedback.
		A.6.2.2 Conduct user feedback and satisfaction surveys, collect and analyse user feedback information, develop user evaluation reports, and provide suggestions for improving customer service.