# Contents

Contents	2
Introduction	4
Stage 1: Planning	5
Planning Step 1: Set Goals	5
PLANNING STEP 1 ACTION ITEM A: SMART GOALS	6
PLANNING STEP 1 ACTION ITEM B: TOP THREE GOALS	7
Planning Step 2: Allocate Resources	8
PLANNING STEP 2 ACTION ITEM: RESOURCES	10
Planning Step 3: Create a Yearly Editorial Planning Timeline/Calendar	
PLANNING STEP 3 ACTION ITEM: YEARLY PLANNING TIMELINE	
Planning Step 4: Identify & Create Your Ideal Audience Persona(s)	
PLANNING STEP 4 ACTION ITEM: PERSONAS	
Planning Step 5: Select Appropriate Channel(s)	
PLANNING STEP 5 ACTION ITEM A: CHANNELS	
PLANNING STEP 5 ACTION ITEM B: TOP CHANNELS	19
Planning Step 6: Define Your Voice	20
PLANNING STEP 6 ACTION ITEM: VOICE	21
Stage 2: Executing	22
Executing Step 1: Set Up Account(s) & Profile(s)	22
EXECUTING STEP 1 ACTION ITEM A: ACCOUNT SET-UP	26
EXECUTING STEP 1 ACTION ITEM B: ACCOUNTS TO FOLLOW	26
Executing Step 2: Curate Content	27
EXECUTING STEP 2 ACTION ITEM: CONTENT	
Executing Step 3: Create a Monthly Content Calendar	29
EXECUTING STEP 3 ACTION ITEM: CONTENT CALENDARS	
Executing Step 4: Package & Post Content	
EXECUTING STEP 4 ACTION ITEM: POST ELEMENTS	
Executing Step 5: Engage with Your Audience	
EXECUTING STEP 5 ACTION ITEM: QUESTIONS	
Stage 3: Monitoring & Optimizing	36
Monitoring & Optimizing Step 1: Grow/Promote Your Social Media Channel(s)	

TORING & OPTIMIZING STEP 1 ACTION ITEM: PROMOTION	ΜΟΝΙΤ
ng & Optimizing Step 2: Measure Results & Optimize Performance	Monitori
TORING & OPTIMIZING STEP 2 ACTION ITEM: MEASUREMENT	MONIT

## Introduction

This *MSKTC Social Media Development Workbook* was developed to provide your Model System with a hands-on way to plan, execute, and monitor and optimize your social media activities step-by-step. The Workbook is your tool to help you to think through all the aspects that contribute to developing an efficient and effective approach to your social media activities. Each step includes space to write (or type) in your ideas and plans, and each section concludes with one or more action items, which will help you document the entire social media development process and implement that plan to meet the needs of your Model System. The end result will be a social media strategic plan you can refer back to and use to guide your strategy and future changes. Some sections of this Workbook will be used only once, during the initial planning and set-up process, while others will be used multiple times throughout your social media endeavors. The accompanying *Guide for Developing an MSKTC Social Media Plan* document is intended to be used in conjunction with this Workbook to help you respond to the questions posed and to create your plan of approach.

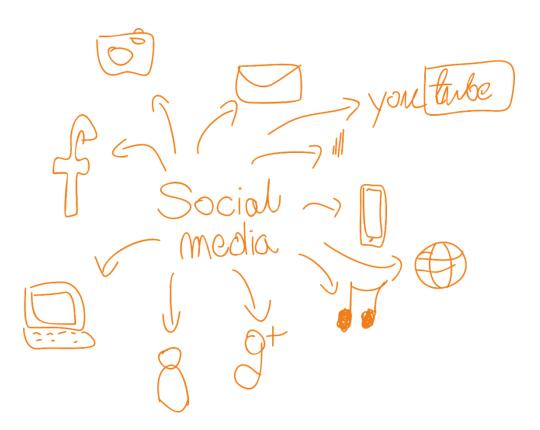


Image Source: https://pixabay.com/en/social-social-media-internet-367943/

# Stage 1: Planning

In the Planning stage, you begin with an idea — to reach audiences through social media to communicate about your research and products. In this section, you will set goals for your social media approach, identify and allocate resources, create a timeline or similar tool to plan your activities, identify and create your audience persona, select the appropriate social media channel to match your goals and audience, and define your organization's voice. If you already have a social media approach in place, use this section to review and update your plan.

## Planning Step 1: Set Goals

Replicate this exercise to address multi-layer goals (e.g., overall long-term goals, short-term campaign goals).

1. What is the mission of your Model System?

2. How will using social media align with and support that mission?

3. What do you want to accomplish by using social media?

4. In what timeframe(s) do you want to accomplish the answers in #3?

5. How will using social media provide value to your Model System *and* your audience (e.g., increase use of Model System products; raise awareness of Model System events)?

#### PLANNING STEP 1 ACTION ITEM A: SMART GOALS

Using the smart model, create a list of goals for your model system's social media activities:

#### SMART GOALS ARE:

-	<b>S</b> pecific	
	•Define explicit goals relative to the desired results.	
$\square$	Measurable	
	•Establish concrete criteria for gauging progress toward goal attainme	ent.
-	Attainable	
	•Consider potential resource restraints that may hinder goal achieven	nent.
-	Relevant	
	•Ensure goals are worthwhile to the mission of your Model System.	
$\square$	Time-Based	
	•Set the goals' timeframe(s) to make them real and tangible.	

# PLANNING STEP 1 ACTION ITEM B: TOP THREE GOALS

List the **top three goals** for your model system's social media activities:



## Planning Step 2: Allocate Resources

You will need to return to this step after reviewing subsequent sections of this Workbook. The amount of staff time needed will depend on which social media outlet you use, how frequently you plan to post new information, and the level of effort you intend to commit to engaging with your audiences.

1. What resources (e.g., time, staff, technology, budget, other) do you already have in place to invest in social media activities?

2. What additional *time* resources will you need to acquire to be successful with social media activities?

3. What additional *staffing* resources will you need to acquire to be successful with social media activities?

4. What additional *technology* resources will you need to acquire to be successful with social media activities?

5. What additional *budget* resources will you need to acquire to be successful with social media activities?

6. What additional *other* resources will you need to acquire to be successful with social media activities?

## PLANNING STEP 2 ACTION ITEM: RESOURCES

Assign the staff members & estimated time needed to complete each social media activity below:

ACTIVITY	STAFF MEMBER(S)	TIME NEEDED
Setting Up Channel(s)/Profile(s)		
Brainstorming Concepts/Campaigns		
Creating Yearly Editorial Planning Timeline/Calendar		
Acquiring Concept/Campaign Buy-In		
Reviewing Concept/Campaign and Providing Buy-In		
Curating External Content		
Curating Internal Content		
Creating Monthly Content Calendars		
Packaging Content		
Writing Copy		
Developing Images and/or Videos		
Reviewing/Approving Content		
Editing Content		
Publishing Content		
Actively Engaging with Others/Spurring Conversation		
Monitoring Channel(s)		
Responding to Interactions from Others		
Cultivating Relationships/Building Alliances		
Promoting Channel(s)		
Measuring Performance		
Reporting Performance		
Optimizing Channel(s) Based on Performance		
Staying Abreast of New Channels		
Other:		
Other:		
Other:		



Image Source: <u>https://pixabay.com/en/social-social-media-internet-367941/</u>

# Planning Step 3: Create a Yearly Editorial Planning Timeline/Calendar

1. What is/are the overall concept(s)/theme(s) for your social media activities?

2. What individual campaigns and major milestones will your Model System need to promote throughout the next year?

3. Who will need to need to provide approval for your social media concept and campaigns?

#### PLANNING STEP 3 ACTION ITEM: YEARLY PLANNING TIMELINE

Using your theme, create a yearly planning timeline, and get it approved by any authorizers.

	JAN	FEB	MAR	APR	MAY	JUN
Campaigns						
Events						
Studies						
Fundraising						
Observances						
Holidays						
Other						
	JUL	AUG	SEP	ОСТ	NOV	DEC
Campaigns						
Events						
Studies						
Fundraising						
Observances						
Holidays						
Other						
pproved By: pproval Date:					PLEVE DUNIT BU	

WEEK4 Design W W C Crede From being WEEK4 Design W W W C Crede From being WEEK5 Design W W C Crede From being WEEK6 Dev S W API ADMIN API FEEK7 Per ADMIN API

Image Source: <u>https://pixabay.com/en/whiteboard-strategy-diagram-849803/</u>

# Planning Step 4: Identify & Create Your Ideal Audience Persona(s)

Describe your <u>current</u> audience (you may repeat this exercise for each audience your MS currently serves):

1. Identify their roles.

2. Identify their interests/motivations pertaining to your Model System.

3. Identify their online/communication behaviors.

4. Identify how your Model System serves them.

5. Identify barriers to serving them.

6. Identify how they interact/engage with your Model System.

7. Identify their feedback of your Model System (positive and negative).

Describe your *ideal* audience (you may repeat this exercise for each audience your MS would like to serve through social media):

1. Define their roles.

2. Define their interests/motivations pertaining to your Model System.

3. Define their online/communication behaviors.

4. Define how your Model System will serve them through social media.

5. Define how your Model System will use social media to overcome barriers to serving them.

6. Define how they will interact/engage with your Model System's social media.

7. Define how your Model System will use social media to reinforce positive feedback and address negative feedback.

8. Define what their actions from your Model System's social media will be.

#### PLANNING STEP 4 ACTION ITEM: PERSONAS

Using the core characteristics identified above, create personas for each main audience type role (roles are: researchers; persons with a specific injury (name their specific injury types as applicable); policymakers, advocates, disability organizations; clinicians, physicians, providers, staff):

PERSONA 1 — CORE CHARACTERISTICS			
Role			
Interests and			
Motivations			
Online Behaviors			

PERSONA 2 — CORI	E CHARACTERISTICS
Role	
Interests and Motivations	
Online Behaviors	

PERSONA 3 — CORE CHARACTERISTICS			
Role			
Interests and			
Motivations			
Online Behaviors			

PERSONA 4 — CORE CHARACTERISTICS			
Role			
Interests and			
Motivations			
Online Behaviors			

E CHARACTERISTICS



Image Source: https://pixabay.com/en/social-media-laptop-notebook-blog-550778/

# Planning Step 5: Select Appropriate Channel(s)

Use the current audience analysis and the ideal audience personas from Planning Step 4:

1. Name all the channels your current Model System audience uses:

2. Name all the channels Persona 1 might use:

3. Name all the channels Persona 2 might use:

4. Name all the channels Persona 3 might use:

5. Name all the channels Persona 4 might use:

6. Name all the channels Persona 5 might use:

#### PLANNING STEP 5 ACTION ITEM A: CHANNELS

Determine the <u>single</u> best channel to use for each audience persona role:

	PERSONS WITH INJURIES, FAMILIES	CLINICIANS, PHYSICIANS, PROVIDERS, STAFF	ADVOCATES, POLICYMAKERS, DISABILITY ORGANIZATIONS	RESEARCHERS	OTHER
Facebook					
Instagram					
Twitter					
Pinterest					
LinkedIn					

#### PLANNING STEP 5 ACTION ITEM B: TOP CHANNELS

Determine the <u>top 1-2</u> channels you will use first:

1. 2.



Image Source: https://pixabay.com/en/twitter-facebook-together-292988/

### Planning Step 6: Define Your Voice

1. What voice does your Model System currently use?

2. What voice will your Model System use on social media?

Check <u>all</u> the ways social media will reflect your Model System's **character**?

- □ Friendly
- Warm
- □ Inspiring
- Relaxed
- □ Authoritative
- Professional
- Other\_\_\_\_\_
- Other\_\_\_\_\_
- Other\_\_\_\_\_

Check <u>all</u> the ways social media will reflect your Model System's **tone**?

- Personal
- Humble
- Clinical
- Honest
- Direct
- □ Scientific
- Other \_\_\_\_\_
- Other \_\_\_\_\_
- Other

# Check <u>all</u> the ways social media will reflect your Model System's **language**?

- □ Complex
- Savvy
- □ Insider
- □ Serious
- □ Simple
- □ Jargon-Filled
- Other \_\_\_\_\_
- Other\_\_\_\_\_
- Other \_\_\_\_\_

Check <u>all</u> the ways social media will reflect your Model System's **purpose**?

- Engaging
- □ Educating
- □ Informative
- □ Enabling
- □ Convincing
- □ Amplifying
- Other \_\_\_\_\_
- Other \_\_\_\_\_
- Other \_\_\_\_\_

#### PLANNING STEP 6 ACTION ITEM: VOICE

Define the <u>top two</u> attributes for your social media voice in each category:

,	
CHARACTER:	TONE:
CHARACTER.	I ONE.
LANGUAGE:	PURPOSE:
LANGUAGE:	PURPUSE:



Image Source: <a href="https://pixabay.com/en/group-team-balloons-abstract-457336/">https://pixabay.com/en/group-team-balloons-abstract-457336/</a>

# Stage 2: Executing

In the Execution stage, you will put your plans to work. First, set up your social media account and profile, then determine the process for adding content. You will need to create a calendar — we offer a sample monthly calendar here — then determine how to package and begin posting content. In addition, you will begin to engage with your audiences and build your relationships and networks.

# Executing Step 1: Set Up Account(s) & Profile(s)

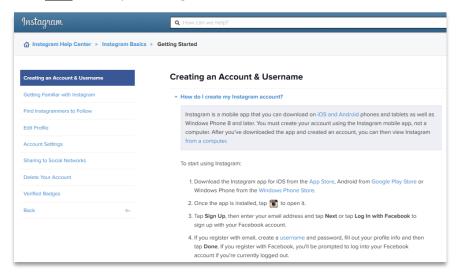
1. Determine the email address/login information that will be used on the channel(s) you chose:

Use the following guides only for the channel(s) you have decided to use.

□ Start <u>here</u> to set up a **Facebook** account:

f Help Center	👱 VetoViolence 🛛 Home 💷 📜	- 😍 –
	How can we help?	۹
👚 Desktop Help 🕞 Get Started on Facebook	Signing Up	English (US)
Create an Account Confirm Your Email Address or Phone Number Troubleshooting Back	Create an Account Before You Sign Up Does it cost money to use Facebook? Is it true that Facebook is going to charge to use the sit How old do you have to be to sign up for Facebook? Can I create a joint Facebook account or share a Facebook account with someone else?	te?
	Can I create multiple Facebook accounts?     Why am I getting a Facebook invitation email from a friend?	

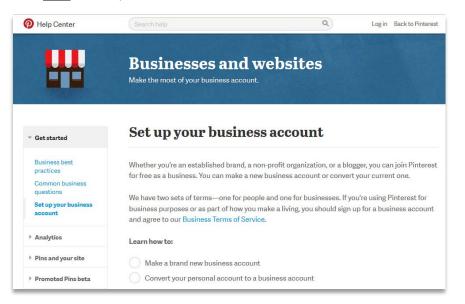
Start <u>here</u> to set up an **Instagram** account:



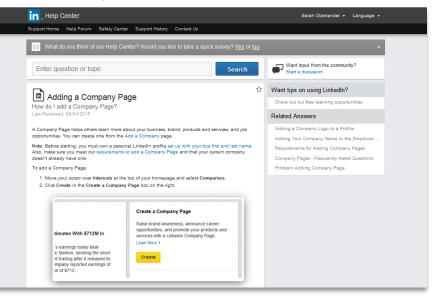
#### □ Start <u>here</u> to set up a **Twitter** account:

🎔 Help Center	Search Q English - 🕅				
Welcome to Twitter	Me Notifications Discover Mobile & Apps Troubleshooting				
FAQs	Signing up with Twitter				
The basics					
	To create an account on the web:				
	1. Go to http://twitter.com and find the sign up box, or go directly to https://twitter.com/signup.				
	2. Enter your full name, phone number, and a password.				
	3. Click Sign up for Twitter.				
	4. In order to verify your phone number, we will send you an SMS text message with a code. Enter the verification code in the box provided. Learn more about having a phone number associated with your account here.				
	5. Once you've clicked Sign up for Twitter, you can select a username (usernames are unique identifiers on Twitter) — type your own or choose one we've suggested. We'll tell you if the username you want is available.				
	6. Double-check your name, phone number, password, and username.				
	7. Click Create my account. You may be asked to complete a Captcha to let us know that you're human.				
	Note: if you'd like to sign up with Twitter using an email address, you can do so via the "Use email instead" link at the bottom of the sign up page.				

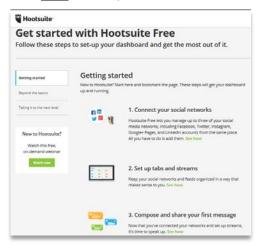
□ Start <u>here</u> to set up a **Pinterest** account:



□ Start <u>here</u> to set up a **LinkedIn** account:



□ Start <u>here</u> to set up a **Hootsuite** account:



□ Start <u>here</u> to set up a **bit.ly** account:



### EXECUTING STEP 1 ACTION ITEM A: ACCOUNT SET-UP

	NAME/ USERNAME	BIOGRAPHY/ DESCRIPTION	CONTACT INFORMATION	LOGO
(Channel 1)				
(Channel 2)				
	BRANDING IMAGES	WEBSITE LINK(S)	ADMINISTRATOR ROLES	PRIVACY SETTINGS
(Channel 1)				
(Channel 2)				

Determine which elements you will use to set up each channel:

#### **EXECUTING STEP 1 ACTION ITEM B: ACCOUNTS TO FOLLOW**

Identify 25-50 accounts to follow on each channel you are using:

CHANNEL 1	CHANNEL 2
MOI	ITH #

# **Executing Step 2: Curate Content**

1. How often will you analyze the assets that your Model System has for content to curate and share?

2. How often will you search other sources for content to curate and share?

3. What existing hashtags can you use to join the conversation and attract viewers interested in content like yours?

4. What new hashtags can you create to promote your Model System's activities?

#### **EXECUTING STEP 2 ACTION ITEM: CONTENT**

Determine the sources from which you will regularly identify content:

FROM YOUR MS		FROM OTHERS		
Asset Name Asset URL		Source Name	Source URL	



Image Sources: <u>https://pixabay.com/en/cloud-blog-tweet-like-share-parts-709095/</u> <u>https://pixabay.com/en/cloud-blog-tweet-like-share-parts-709098/</u> <u>https://pixabay.com/en/cloud-photo-blog-tweet-like-share-709099/</u>

# **Executing Step 3: Create a Monthly Content Calendar**

Plan to replicate this exercise each month. Identify a process and person responsible for these monthly updates with input from the team.

1. What major milestones are planned for this month?

2. What are your goals for this month's major milestones?

3. Which content can be scheduled in advance this month, and which will require you to reserve time for ad hoc posts and updates?

4. What will be the frequency of *developing* and *reviewing* this month's content?

5. What will be the frequency of *scheduling* and *publishing* this month's content?

#### **EXECUTING STEP 3 ACTION ITEM: CONTENT CALENDARS**

Create detailed content calendars for upcoming months (see screenshot example below; use sample spreadsheet from the MSKTC to complete)

1 🛃 🗟 📽 🗳 🕻			_	ledia-Development-M	lonthly-Content-Caler	ndar.docx -	Microsoft Excel				- 0
File Home	Insert Page Layout	Formulas Dat	a Review View								ت 😮 م
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Clipboard	G Font		Alianment	G	Number 5	Formatting	<ul> <li>as Table - Styles -</li> <li>Styles</li> </ul>		Cells		Select *
K44	- fx	с од	Angrimene		Number is		Styles			Conting	
Δ	В	С	D	F	F	G	н			к	1
DAY/MILESTONE	TOPIC	CALL TO ACTION/GOA		IMAGE	LINK	AUTHO	CREATION	REVIEWE	REVIEW	APPROVAL/REVISIONS	FINAL COPY
Monday, May 11											
Stroke Awareness Month	Stroke Awareness Month – Cooking Demo	Register	Learn how to cook for healthy living this Thursday! One of our disticians will host a cooking demonstration at 6 in the 8th floor dining room. Reserve your space today: 312-238-4525 or hnarzan@rir ore	Image of participants from last demo: "Participants-Demo-4- 16-15.jpg"	N/A	Amber	Tuesday, May 5	Todd	Friday, May 8	Approved with change from "living" to "eating."	Learn how to cook for he eating this Thursday! On dieticians will host a coo demonstration at 6 in th floor dining room. Reser space today: 312-238-45 hpaczan@ric.org
ruesday, way 12	Healthy Voice	Clicklink	We can all benefit by resting our	N/A	http://www.ric.org/ap	Amber	Tuesday, May 5	Todd	Friday, May 8	Approved with no	We can all benefit by re
Wednesday, May 13			voices, drinking more water and avoiding certain irritants to keep our voices healthy. Learn more!		files/public/5195/BSHI 511.docx					revisions	voices, drinking more w avoiding certain irritant our voices healthy. Lear
Wednesday, May 13											
	RIC Matters	Get involved	The Ronald McDonald House "Meal from the Heart" is an annual (soon to be semi-annual) event in which RIC nurses and PCTs from all floors participate, and is hosted by the Recruitment and Retention Committee. Check out pictures from last time, and ret involved!	Image of nurses at RMHC: "img-ricmatters- MealsHeart- 20150513.jpg"	http://www.ric.org/ ursing/ric-cares	n Amber	Tuesday, May S	Todd	Friday, May 8	Approved with no revisions	The Ronald McDonald H "Meal from the Heart" is annual (soon to be semi event in which RIC nurse PCTs from all floors part and is hosted by the Rec and Retention Committ out pictures from last ti rest involved!
Thursday, May 14											
Stroke Awareness Month	Stroke Awareness Month – Cooking Demo	Register	Kelly Niemaszyk, one of our dieticians, will host at talk and cooking demonstration on "Healthy Eating" tonight at 6 in the 8th floor dining room. Register: 312-238-4525 or	Image of Kelly from last demo: "Kelly-Demo-4-14 15.jpg"		Amber	Tuesday, May 5	Todd	Friday, May 8	Approved with no revisions	Kelly Niemaszyk, one of dieticians, will host a ta cooking demonstration "Healthy Eating" tonight the 8th floor dining room Register: 312-238-4525
Friday, May 15											
	RIC Matters	Get involved	RIC Sports is looking for assistance with the adaptive archery program. To get involved, please contact Jason Stubbeman		N/A	Amber	Tuesday, May 5	Todd	Friday, May 8	Approved with no revisions	RIC Sports is looking for assistance with the ada archery program. To get please contact Jason Str



Image Source: <u>https://pixabay.com/en/paper-calendar-planner-pen-606649/</u>

# Executing Step 4: Package & Post Content

1. Which format for posting (text-only updates, links to content on websites, images, or videos) will be your "staple" format?

2. What calls-to-action will you use in your posts?

3. What scheduling tools will you use for publishing content?

#### **EXECUTING STEP 4 ACTION ITEM: POST ELEMENTS**

TITLE	LINK/URL	IMAGE	VIDEO	CALL-TO-ACTION

Create a list of elements to use in your posts (e.g., titles, links/URLs, images, videos, calls-to-action):



Image Source: <u>https://pixabay.com/en/cms-wordpress-265126/</u>

# **Executing Step 5: Engage with Your Audience**

1. What kinds of questions can you ask to engage your audience(s) in conversation?

2. What kinds of surveys can you use to engage your audience(s) in conversation?

3. What kinds of polls can you use to engage your audience(s) in conversation?

4. How will you determine which audience testimonials/success stories you will use?

5. How will you moderate (review and clear) comments on your social media channel(s)?

6. What are the implications of responding (or not responding)?

7. How will you respond?

8. Under what circumstances will you remove inappropriate comments and block problematic audience members?

## **EXECUTING STEP 5 ACTION ITEM: QUESTIONS**

4	
	1.
	2.
	3.
	4.
	5.
	6.
	7.
	8.
	9.
	10.
	11.
	12.

Develop a set of engaging questions to ask each week for the first 12 weeks:



Image Source: <u>https://pixabay.com/en/balloons-rectangle-communication-874838/</u>

# Stage 3: Monitoring & Optimizing

In the Monitoring and Optimizing stage, after you have executed your plan for social media, you will want to make sure you have optimized your approach and built an ongoing effort to reach audiences. Also, it is important to track your social media outreach and use data to inform both ongoing work and future changes to your plan.

# Monitoring & Optimizing Step 1: Grow/Promote Your Social Media Channel(s)

1. Which organizations similar to your Model System can you partner with to cross-post/promote each other's social media content?

2. Which organizations and individuals can join your audience, become allies, and support your social media activities?

3. Which influencers' support can you leverage as "cheerleaders" to share your content, highlight your account(s), and utilize relevant hashtags?

## **MONITORING & OPTIMIZING STEP 1 ACTION ITEM: PROMOTION**

Identify opportunities to promote your social media channel(s):

ONLINE OPPORTUNITIES	OFFLINE OPPORTUNITIES



Image Source: https://pixabay.com/en/system-network-news-personal-71228/

# Monitoring & Optimizing Step 2: Measure Results & Optimize Performance

1. What are the key social media metrics your Model System will track for each channel?

2. How often will you monitor your social media activity performance?

3. Thinking back to your overall goals, what actions are important to see happen from your social media activities?

#### **MONITORING & OPTIMIZING STEP 2 ACTION ITEM: MEASUREMENT**

Choose the metrics most important to your model system, and record the performance of your channel(s) on those metrics on a regular basis:

[CHANNEL 1 NAME: MONTH, YEAR]						
	Performance This Month	Performance Previous Month	% Change Month-Over-Month			
[Metric 1]		renomiance rievious wonth	Wonth-Over-Wonth			
[Metric 2]						
[Metric 3]						
[Metric 4]						
[Metric 5]						

[CHANNEL 2 N	[CHANNEL 2 NAME: MONTH, YEAR]						
	Performance This Month	Performance Previous Month	% Change Month-Over-Month				
[Metric 1]							
[Metric 2]							
[Metric 3]							
[Metric 4]							
[Metric 5]							



Image Source: <u>https://pixabay.com/en/person-man-boy-face-section-844258/</u>