MSKTC Social Media Development Workbook

Contents

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/
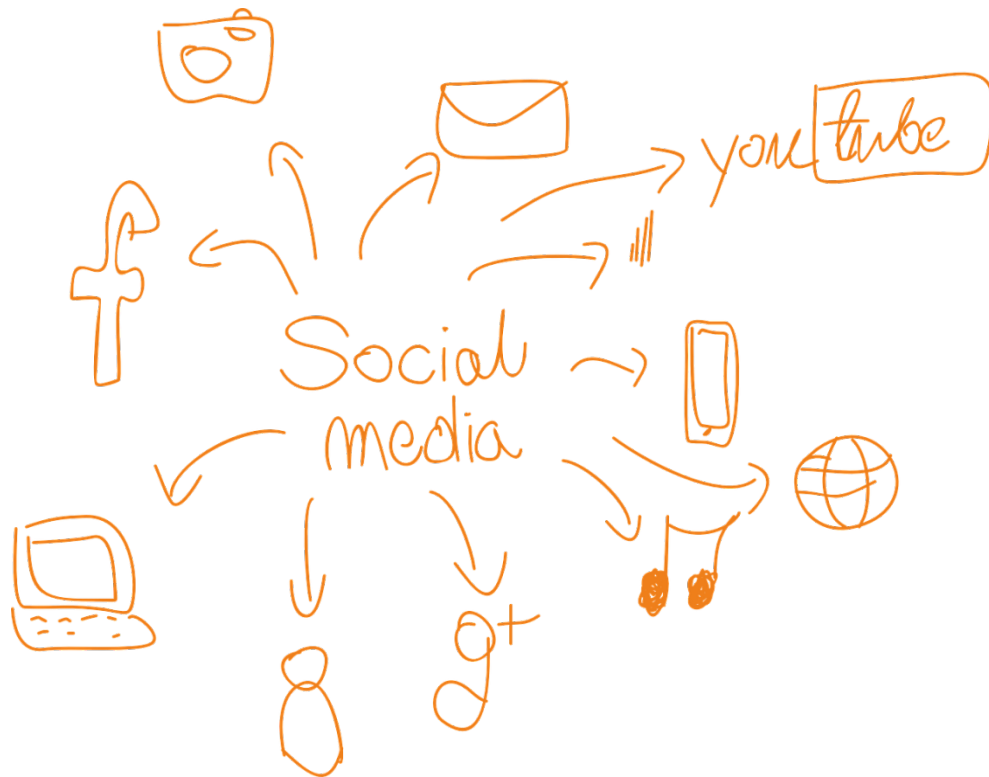
Stage 1: Planning

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:

Specific

•Define explicit goals relative to the desired results.

Measurable

•Establish concrete criteria for gauging progress toward goal attainment.

Attainable

•Consider potential resource restraints that may hinder goal achievement.

Relevant

•Ensure goals are worthwhile to the mission of your Model System.

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:

1.

2.

3.

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?

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

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***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: https://pixabay.com/en/social-social-media-internet-367941/

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.

Theme(s):

	JAN	FEB	MAR	APR	MAY	JUN
Campaigns						
Events						
Studies						
Fundraising						
Observances						
Holidays						
Other						

	JUL	AUG	SEP	OCT	NOV	DEC
Campaigns						
Events						
Studies						
Fundraising						
Observances						
Holidays						
Other						

Approved By:

Approval Date:

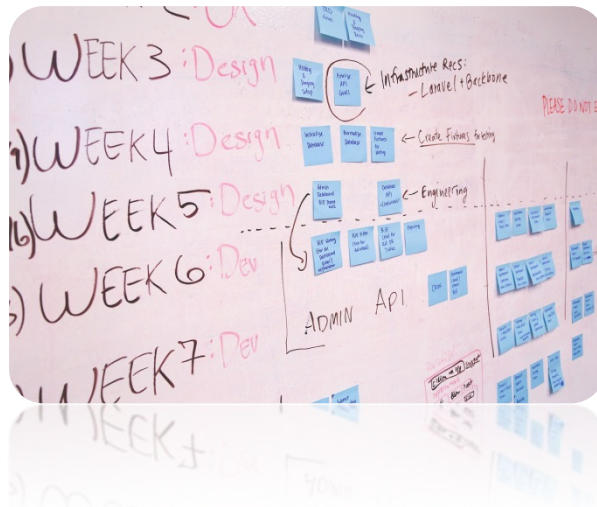*Image Source: https://pixabay.com/en/whiteboard-strategy-diagram-849803/*

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

Describe your current 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.

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

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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.

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

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3. Define their online/communication behaviors.

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

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

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

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

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

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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 — CORE 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	

PERSONA 5 — CORE CHARACTERISTICS	
Role	
Interests and Motivations	
Online Behaviors	

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.

Planning Step 6: Define Your Voice

1. What voice does your Model System currently use?

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

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

- ☐ Friendly
- ☐ Warm
- ☐ Inspiring
- ☐ Relaxed
- ☐ Authoritative
- ☐ Professional
- ☐ Other _____
- ☐ Other _____
- ☐ Other _____

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

- ☐ Personal
- ☐ Humble
- ☐ Clinical
- ☐ Honest
- ☐ Direct
- ☐ Scientific
- ☐ Other _____
- ☐ Other _____
- ☐ Other _____

Check all the ways social media will reflect your Model System's **language**?

- ☐ Complex
- ☐ Savvy
- ☐ Insider
- ☐ Serious
- ☐ Simple
- ☐ Jargon-Filled
- ☐ Other _____
- ☐ Other _____
- ☐ Other _____

Check all 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 top two attributes for your social media voice in each category:

CHARACTER:	TONE:
LANGUAGE:	**PURPOSE:**

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 here to set up a **Facebook** account:
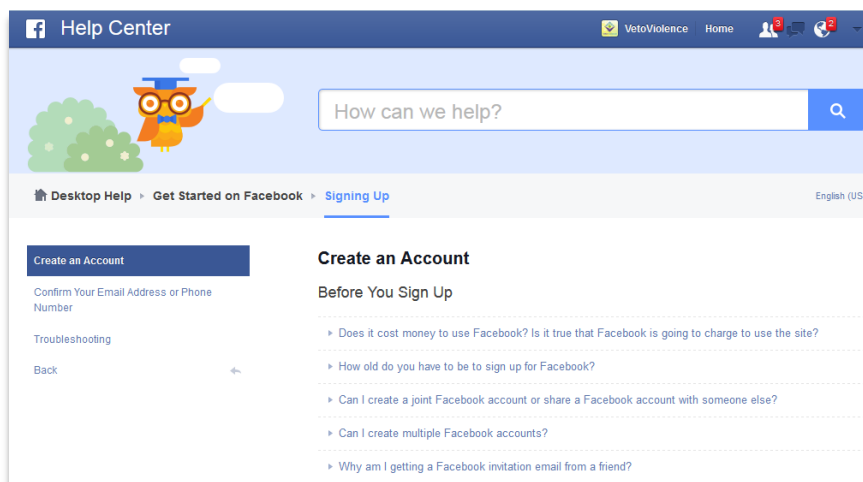
☐ Start <u>here</u> to set up an **Instagram** account:
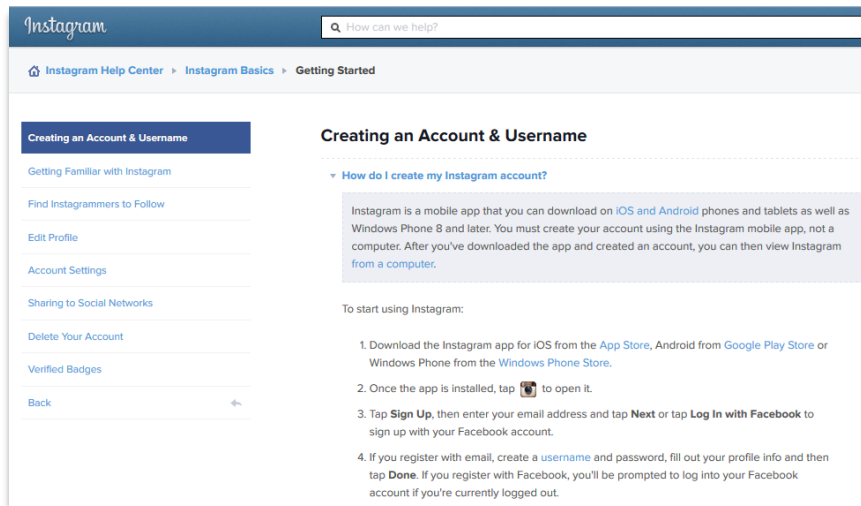
☐ Start <u>here</u> to set up a **Twitter** account:
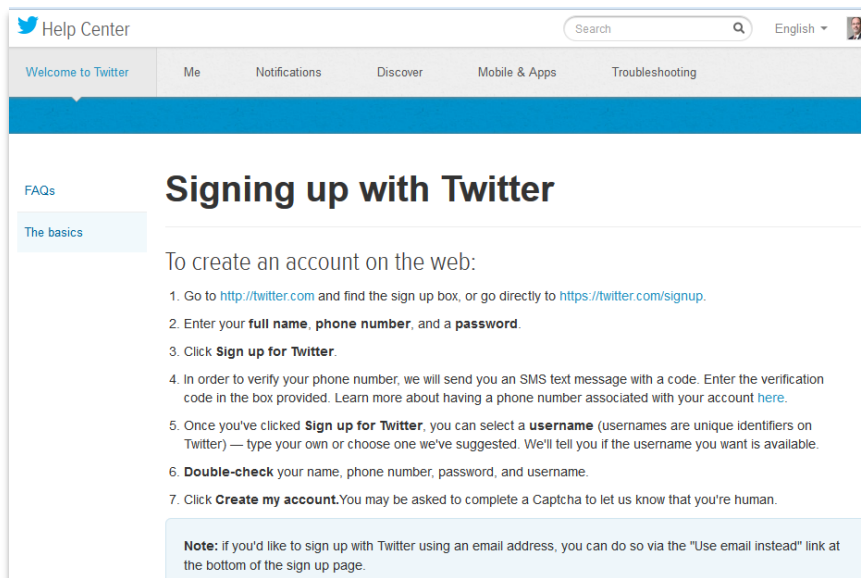
Start <u>here</u> to set up a **Pinterest** account:
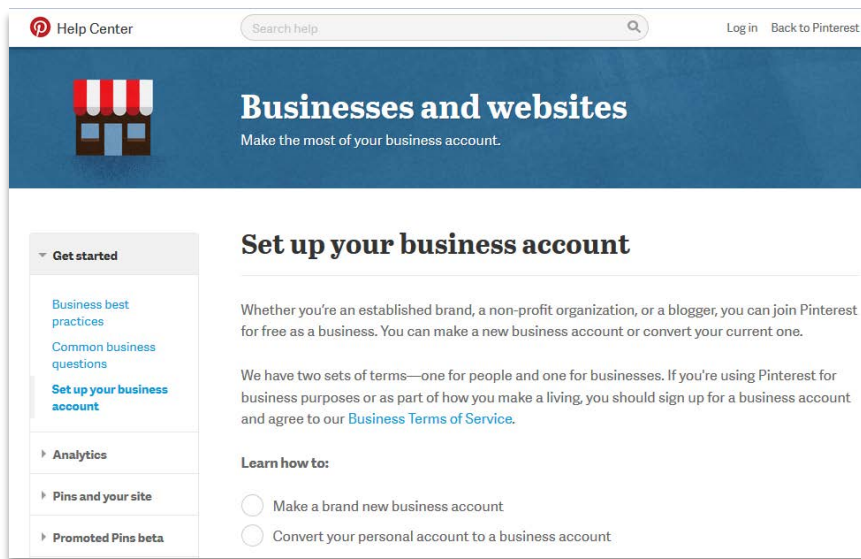
 Start <u>here</u> to set up a **LinkedIn** account:
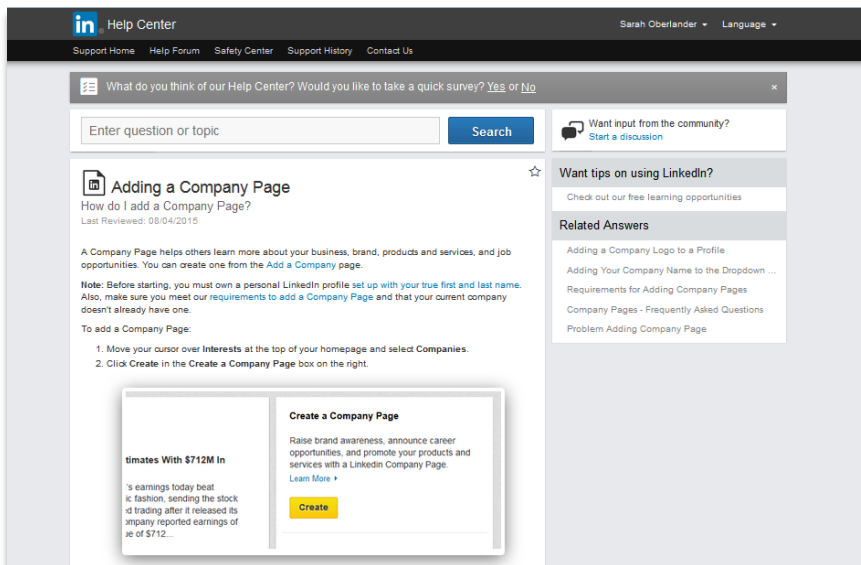
☐ Start <u>here</u> to set up a **Hootsuite** account:
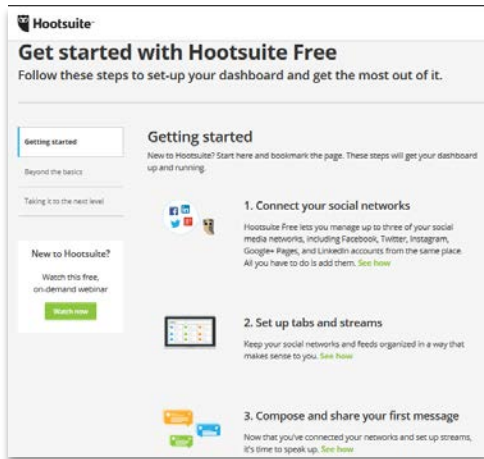
☐ Start <u>here</u> to set up a **bit.ly** account:
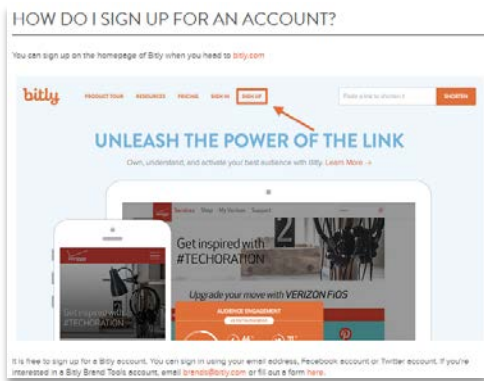
EXECUTING STEP 1 ACTION ITEM A: **ACCOUNT SET-UP**

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

	NAME/ USERNAME	BIOGRAPHY/ DESCRIPTION	CONTACT INFORMATION	LOGO
(Channel 1)				
(Channel 2)				

	BRANDING IMAGES	WEBSITE LINK(S)	ADMINISTRATOR ROLES	PRIVACY SETTINGS
(Channel 1)				
(Channel 2)				

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
MONTH #	

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

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)

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**

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

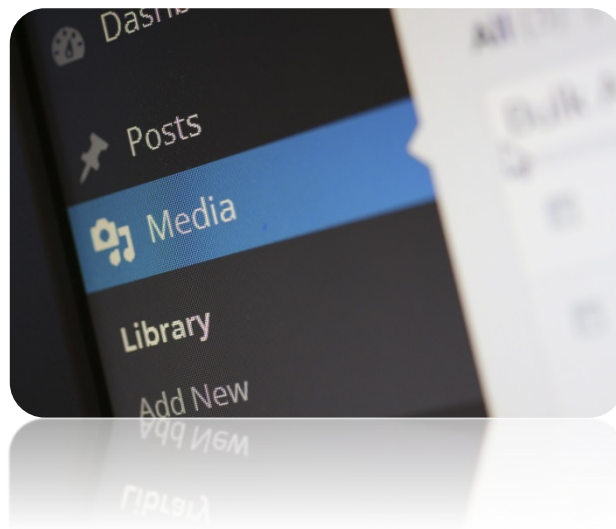| TITLE	LINK/URL	IMAGE	VIDEO	CALL-TO-ACTION

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

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

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

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

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

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):
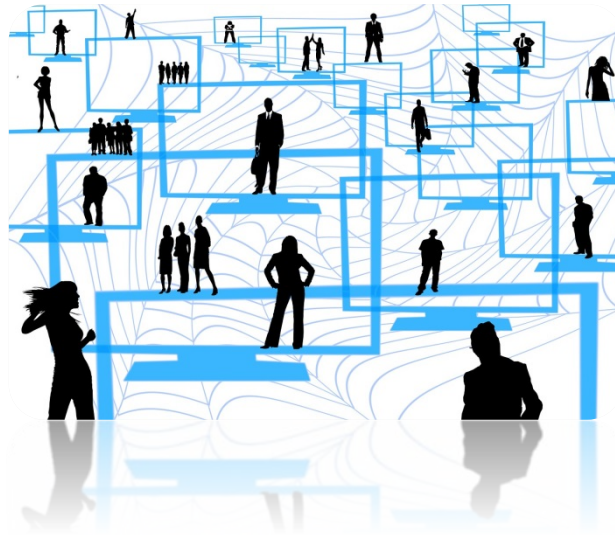
ONLINE OPPORTUNITIES	OFFLINE OPPORTUNITIES

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]			
[Metric 2]			
[Metric 3]			
[Metric 4]			
[Metric 5]			

[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: https://pixabay.com/en/person-man-boy-face-section-844258/