Guide for Developing a Social Media Plan

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Model Systems Knowledge Translation Center

Translating Research into Rehab and Better Living

The contents of this tool were originally developed in 2015 under a grant from the National Institute on Disability and Rehabilitation Research (NIDRR), Department of Education (ED grant number H133A110004). It was reviewed and updated in 2025 under a grant from the National Institute on Disability, Independent Living, and Rehabilitation Research (NIDILRR; grant number 90DPKT0009). NIDILRR is a Center within the Administration for Community Living (ACL), U.S. Department of Health and Human Services (HHS). The contents of this tool do not necessarily represent the policy of NIDILRR, ED, NIDILRR, ACL, or HHS, and you should not assume endorsement by the federal government.

Recommended citation: Model Systems Knowledge Translation Center. (2025). *Guide for developing a social media plan.* https://msktc.org/knowledge-translation/use-social-media/guide-developing-msktc-social-media-plan

Contents

Introduction

The *Guide for Developing a Social Media Plan* was developed to provide your Model System with practical tips, background information, best practices, and points to consider when creating a social media plan. The guide begins with the **Planning** stage: How will you begin to create your social media approach, and what resources do you need to accomplish it? Next, the guide provides tools and tips for the **Execution** stage to make your social media work happen. The guide concludes with the **Monitoring and Optimization** stage, in which you will sustain your social media approach by tracking outcomes and considering how to expand and grow your outreach efforts. This guide is intended for use as you complete the *MSKTC Social Media Development Workbook*.

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.

Step 1: Set goals.

1. Assess your Model System's mission and determine how your social media activities will align with and support that mission.
2. Examine your Model System's policies regarding privacy, disclaimers, accessibility, and terms of use, and adopt policies for your social media activities as needed.

3. Identify where your social media messages will originate from within the organization's structure. That is, who are you representing—the overall organization or a specific group within it?
4. Define what you want to accomplish by using social media and in what timeframe you want to make those achievements. Examples of accomplishments include:
   - resources downloaded
   - event registrations received
   - donations procured
   - funds raised
   - partners acquired
   - study participants recruited

Best Practice: Use the SMART model to develop your goals.

- ***S**pecific*: Define explicit goals relative to the desired results.
- ***M**easurable*: Establish concrete criteria for gauging progress toward goal attainment.
- ***A**ttainable:* Consider potential resource restraints that may hinder goal achievement (see Planning Step 2).
- ***R**elevant:* Ensure goals are worthwhile to the mission of your Model System.
- ***T**ime-Based:* Set each goal's timeframe to make it real and tangible.

Step 2: Allocate resources.

You will need to return to this step after reviewing subsequent sections of this guide. 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. Evaluate the time, staff, technology, budget, and other resources you already have to invest in social media.
2. Determine the additional time, staff, technology, budget, and other resources you will need to set up, execute, and monitor your social media activities.

Best Practice: Pay attention to the following considerations to identify the processes and procedures you will use to manage your social media activities, including:

- timelines for creating and sharing content,
- standards and style guides for content, and
- workflows for reviewing and approving content.

Step 3: Create an editorial planning timeline/calendar.

1. Brainstorm overall concepts/themes for social media activities that reinforce your Model System's mission on a monthly, quarterly, or yearly basis.
2. Develop individual campaigns (i.e., groups of messages that work in an organized way toward a particular goal) throughout the year that align with your Model System's activities and major milestones.
3. Create an editorial planning timeline/calendar to outline all dates that are pertinent to your Model System (e.g., events, studies, fund-raising, observances, holidays).
4. Acquire the appropriate buy-in from Model System staff and authorization from your organization as needed for the concepts and campaigns.

Example: Planning Timeline

	Jan	Feb	Mar	Apr	May	Jun
Campaigns		The Challenge!				Heads Up Concussion
Events			3/12–3/14 BIAOR Conference	4/15–4/16 TBI Conference 4/21–4/24 ABA Meeting 4/30–5/1 NARRTC Conference	Volunteer drive	6/11–6/18 Art in Motion 6/20 S FL Conference SCI & TBI
Studies		February Study		April Study		June Study

	Jan	Feb	Mar	Apr	May	Jun
Fund-raising		3rd-Party Fund-Raiser	Matching Gifts Drive	3rd-Party Fund-Raiser	Stock Gifts Drive	Tribute Gifts Drive
Observances			3/18 TBI Awareness			
Holidays	MLK	Valentine's	St. Patrick's			Beginning of Summer
Other	Sports & Rec Program	Sports & Rec Program	Sports & Rec Program	Sports & Rec Program	Sports & Rec Program	Sports & Rec Program

Step 4: Identify and create your ideal audience personas.

Personas are fictional characters created to represent each *type* of person who might use your Model System's social media. By creating personas, you and your staff will have a sense of the general audience type that you are trying to reach.

1. Analyze your *current* audience, identifying their core persona characteristics as well as how your Model System serves them, barriers to serving them, how they interact and engage with your Model System, and their feedback of your Model System (positive and negative). From your current Model System audience, who uses social media, and why?
2. Create personas of your *ideal* social media audience, defining their core persona characteristics as well as ideal ways in which your Model System will address their interests and motivations through social media and communicate in their preferred manner.

Core Persona Characteristics

- **Roles (Who are they?)**: Researchers; persons with a specific injury (name their specific injury type as applicable); policy makers, advocates, disability organizations; clinicians, physicians, providers, staff; donors, funders; media outlets, reporters; community leaders; educators; collaborators; grantees; the general public.
- **Interests and motivations (Why should they care/what are their primary needs?):** Informing the field; receiving help for injuries; changing policy, passing legislation; preventing injury; treating injury; raising funds; donating funds; caring for patients; partnering, collaborating; educating others; reporting news or events.
- **Online behaviors (How do they communicate?**): Type of social media they use; how they use social media; how they obtain information; how they prefer to engage online with organizations like yours; what other organizations are they affiliated with through social media.

Example: Persona Development

Michael

Role

Michael is a researcher who specializes in traumatic brain injuries.

Interests and Motivations

His current research interests include the role of neurotransmitter signaling during early stages of nervous system development; the signals that influence the proliferation, migration, and differentiation of cells of the cerebral cortex; and stem cell biology. When he is not working, he enjoys playing disc golf and quality time with his four grandchildren.

Online Behaviors

- Uses LinkedIn for professional networking. After each conference he attends, he takes the business cards of the other experts he met and finds and connects with them on this channel.
- Uses Facebook to keep in touch with friends from college and grad school as well as to see pictures of his grandchildren. He also "likes" pages of organizations that provide information and resources on neurobiology, stroke, and traumatic brain injury.

Best Practice: Pay attention to the following considerations when developing your audience personas:

» *Compliance and accessibility*: Individuals with visual, auditory, physical, speech, cognitive, and neurological disabilities may have trouble accessing, understanding, and using your social media unless you apply Section 508 compliance and accessibility standards.

» *New versus returning visitors*: First-time visitors to your social media may have different needs than returning or repeat visitors.

» *Change happens*: Audiences change. Needs change. Technologies change. Provide ongoing opportunities to learn from your visitors and update your personas on a regular basis to be certain that you are reaching the audiences you intend to reach.

Step 5: Select appropriate channels.

1. Adopt one to two best-fitting channels first and build on successes by adopting additional tools as needed over time. *Hint:* It is more important to be great at one channel than mediocre at three or four channels.

There are a number of existing and growing social media channels to choose from:

- YouTube
- Facebook
- Instagram
- Pinterest
- TikTok
- BeReal
- Threads LinkedIn
- WhatsApp
- Snapchat
- X/Twitter
- Reddit
- Bluesky

Step 6: Define your voice.

Your "voice" is your organization's personality. Social media provides the opportunity to humanize organizations and make them relatable to their audience.

1. Reflect on the voice your Model System currently uses in various media (e.g., website, e-newsletters, brochures, letters).
2. Use categories and related attributes to define the voice you will use in your Model System's social media channels. These include:
   - *Character*: Attributes include friendly, warm, inspiring, relaxed, authoritative, professional.
   - *Tone*: Attributes include personal, humble, clinical, honest, direct, scientific.
   - *Language:* Attributes include complex, savvy, insider, serious, simple, jargon-filled.
   - *Purpose*: Attributes include to engage, educate, inform, enable, convince, amplify.
3. Although you may adopt slightly different voices depending on the channel, you should aim for consistency across all social media properties.
4. If multiple people are working on social media activities, review the voice you want to project with staff to ensure consistency.
5. Refer to your goals and editorial planning timeline/calendar (above) when questions arise.

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—a sample monthly calendar is included with this guide—and then determine how to develop and begin posting content. In addition, you will begin to engage with your audiences and build your relationships and networks.

Step 1: Set up accounts and profiles.

1. Set up your social media accounts with a common, organizational email address/login rather than using a staff member's work email address. This is especially important when multiple staff members will be accessing and managing the accounts.
2. Create accounts for the top one or two channels you chose in Planning Step 5, following the guidelines provided by the channels. Hint: Remember that the process for creating a social media account and setting up a profile will vary by channel and can change from time to time, so you will need to examine the platform you will use to determine which elements are required at the time of set-up.
3. Consider setting up peripheral accounts to help you manage your accounts, schedule posts, review analytics reports, and shorten URLs. The two most-recommended tools are:
   - *Hootsuite:* A social media management system for brand management using a dashboard user interface to support social media integrations and analytics for X (Twitter), Facebook, LinkedIn, Instagram, and others.
   - *bitly:* An online service that shortens URLs so they can be used more easily with any social media channel. Bitly shortens web addresses to meet character limits, plus it tracks clicks on links.
4. Determine the name and/or username, biography and/or description, contact information, logos, branding images, website links, administrator roles, and privacy settings you will use for each account. Demonstrate a **consistent brand experience** across all online properties, including your website and social media channels.

5. Find 25–50 accounts to follow on a regular basis on each channel you have chosen to use.
6. Be mindful of your following ratio (i.e., the number of accounts you "follow" compared to the number of accounts that follow you).
   - Follow accounts of those you want to follow you in return. *Hint:* Review those accounts' followers and who they are following in turn to find additional relevant accounts to follow.
   - Follow the trusted experts in your field.
   - Follow news sources relevant to your topic area or research area.
   - Use the search tool in your chosen social media channels to find accounts that are posting about your field:
     - search a variety of relevant terms, phrases, and hashtags (see Executing Step 2)
     - follow the accounts that are contributing most to the conversation
   - As your audience grows (see tips for increasing your follower count in Monitoring and Optimizing Step 2), continually analyze followers, follow back appropriate accounts, and follow relevant accounts that your audiences follows.

Step 2: Curate content.

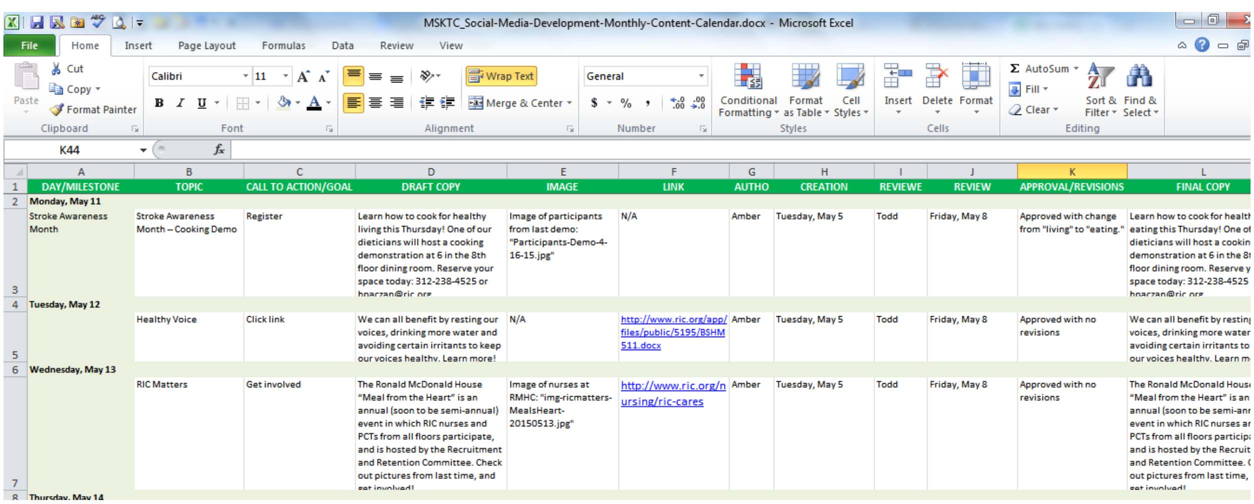
1. Identify **original**, internal content.
   - Analyze your current content assets, including information on your website, calendars (e.g., special events, fund-raising drives, in-house education programs, opportunities for involvement and volunteering, employee events), e-newsletters, etc.
   - Use those assets to develop your social media (which you can publish in Executing Step 4), aligning all online properties in a *coordinated approach* to information dissemination.

2. Find relevant and useful content from **others** (i.e., external content).
   - Set a schedule (e.g., two or three times per month, one or two times per week) to search other sources for content to share.
   - Examples include websites, e-newsletters, and social media accounts from
     - » other Model Systems,
     - » relevant experts/leaders in the field,
     - » federal resources, and
     - » news/media outlets.
3. Consider these content examples when searching for material to use:
   - Information:
     - » scope of work
     - » patient education/consumer factsheets
     - » interviews
     - » Seasonal/holiday tips
   - Research/clinical studies:
     - » findings
     - » participant recruitment
   - Research:
     - » publications
     - » scientists' activities
   - Announcements/press releases:
     - » funding/grant opportunities
     - » partner achievements
   - Events:
     - » conferences
     - » fund-raising
     - » webinars
     - » trainings
     - » lectures
     - » discussion/focus groups
   - CTAs/Participation:
     - » asking followers questions
     - » communicating with partners
   - Ads:
     - » recruitment efforts
     - » funding drives
     - » major news
4. Employ the power of **hashtags**. *Note:* The pound sign—or hash—turns any word or group of words that directly follow it into a searchable link. This allows you to organize content and track discussion topics based on those keywords.
   - Search for *existing* hashtags that are relevant to your Model System and join the conversation and attract viewers interested in content like yours.
   - Create *new* hashtags to promote your Model System's activities.

Step 3: Create a monthly content calendar.

1. Using the timeline you created in Planning Step 3, analyze this month's major milestones (e.g., observances, holidays, events, studies, fund-raisers, campaigns, resource launches).
2. Align this month's major milestones with the goals you set in Planning Step 1 and the content you curated in Executing Step 2.
3. Decide which content can be used across all social media channels and which will be channel-specific.
4. Select **when** the campaigns will need to be executed. Leave room for real-time, ad hoc updates, as needed.
   - Determine the frequency of *developing and reviewing* content (e.g., one time per month, one time per week).
   - Determine the frequency of *packaging and posting* content (e.g., two times per day, three times per week). Use a scheduling tool to queue a batch of posts ahead of time.
5. Revisit Planning Step 2 and consider the resources you have allocated to execute your social media plan to ensure that you have the right level of effort to contribute to this work.

Example: Monthly Content Calendar


MSKTC_Social-Media-Development-Monthly-Content-Calendar.docx - Microsoft Excel

DAY/MILESTONE	TOPIC	CALL TO ACTION/GOAL	DRAFT COPY	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 dieticians will host a cooking demonstration at 6 in the 8th floor dining room. Reserve your space today: 312-238-4525 or hpaczan@ric.org	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 healthy eating this Thursday! One of our dieticians will host a cooking demonstration at 6 in the 8th floor dining room. Reserve your space today: 312-238-4525 or hpaczan@ric.org
Tuesday, May 12											
	Healthy Voice	Click link	We can all benefit by resting our voices, drinking more water and avoiding certain irritants to keep our voices healthy. Learn more!	N/A	http://www.ric.org/app/files/public/5195/BSHM511.docx	Amber	Tuesday, May 5	Todd	Friday, May 8	Approved with no revisions	We can all benefit by resting our voices, drinking more water and avoiding certain irritants to keep our voices healthy. Learn more!
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 get involved!	Image of nurses at RMHC: "img-ricmatters-MealsHeart-20150513.jpg"	http://www.ric.org/nursing/ric-cares	Amber	Tuesday, May 5	Todd	Friday, May 8	Approved with no revisions	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 get involved!
Thursday, May 14											

Step 4: Develop and post content.

1. Now that you have found the internal material you will use in your social media activities and established when new content will be developed and published, you will need to decide the **format** you will use to disseminate that content.
   - Start with the basic post formats, including text-only updates, links to content on websites, images, and videos. Remember that the type of content you develop will depend on the channels you chose in Planning Step 5.
2. Put together the content you curated. Then, using the chosen format, write the **text** and add the **images**, **videos**, and/or **links** to content on websites that you will share on your social media channels. *Hint:* Provide the same content in multiple formats to increase accessibility, reinforce messages, and give your audience different ways to interact with your channels based on their level of engagement and access to media.
3. Include a **call to action (CTA)** in every post, using a strong verb to direct your audience to complete the action you desire. Examples include:
   - "View…"
   - "Download…"
   - "Register…"
   - "Sign up…"
   - "Connect…"
   - "Join…"
   - "Visit…"
   - "Donate…"
   - "Partner…"
   - Read…"
   - "Share…"
   - "Participate…"
   - "Volunteer…"
   - "Learn…"
   - "Comment…"
   - "Watch…"
   - "Reserve…"
   - "Give…"
4. **Publish** the content you developed to your chosen social media channels, using scheduling tools to queue batches of posts ahead of publishing time.

Step 5: Engage with your audience.

When developing content, it is important to engage your audience in discussion, both with your Model System and with each other.

Creating Opportunities for Engagement

1. Use questions, surveys, quizzes, and polls.
   - Listen to your audiences' responses.
   - Respond within 1 hour and no more than 24 hours, as appropriate, to build relationships and show the human side of your Model System's organization.
   - Report back to your audience on any quiz or poll results.
   - If unexpected, insightful, or on-trend topics arise, use those ideas to spur further conversations.
2. Cultivate and share audience testimonials and success stories.
   - Use the existing Patient Stories and videos from your website.
   - Ask your audience to share new stories about their experiences with your Model System.

Responding to Your Audience

3. Check your accounts and respond to audience comments at least daily to build alliances and stay on top of conversations. *Hint:* Engagement is more than just quickly responding to comments or questions, and audiences can quickly tell if you are only interested in or equipped to handle one-way communication.
   - Determine how you will handle challenging questions or comments. Think through the implications of responding (or not responding) and decide whether offering a response is appropriate, considering these questions:
     - » Would your response stay within the mission of your Model System?
     - » Is it a baiting question meant to be divisive and controversial?
     - » Would responding create an unsustainable expectation for responding to other inquiries?

    - Is there someone else better apt to address the question or comment?
    - Is the question coming from a reporter or prominent blogger?
    - How likely will you responding or your response garner media attention?
  - When you respond, consider using one of the following methods. Generic, boilerplate responses have their purposes, but they often miss the point of direct engagement.
    - *Respond directly to the original comment*. For instance, if a question were posted on your Facebook page, you may choose to post a response as a comment or reply to the original post. Be aware that this may set an unsustainable expectation with your audience if you do not have adequate time and staff resources for this method.
    - *Respond with a subsequent post.* Instead of directly responding to a single individual, you may choose to provide the information to all followers. This indirect communication can help avoid setting expectations of direct responses to all individuals.
    - *Point to existing content or add new information or resources on your website.* If a question or comment requires a more extended response than is allowable on certain social media channels, you may choose to use your primary web communication platform (e.g., website, blog) and then direct the original commenter to this resource in your response.

4. Give time for others to respond to the question or comment raised. Do not monopolize the conversation.
5. Remove inappropriate comments, and when needed block problematic audience members.

Stage 3: Monitoring and 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.

Step 1: Grow/promote your social media channels.

1. Identify and learn about potential partners, allies, and “cheerleaders.”
   - Identify organizations similar to your Model System (e.g., other model systems, local businesses, national organizations, government agencies) with which you can **partner** to cross-post and promote each other’s social media content.
   - Find organizations and individuals (e.g., new physician residents, staff members, Consumer Advisory Board members) to join your audience, become **allies**, and support your social media activities.
   - Leverage the help of relevant influencers to be your **cheerleaders** by asking them to share your content, highlight your accounts, and use relevant hashtags.
2. Promote your social media channels throughout your Model System’s activities. For example:
   - Include your social media channel(s) in all marketing materials, both online and offline.
   - Advertise your social media channels during outreach efforts.
   - Add a social sharing button or box to your website.
   - Include your social media channels’ information in guest author bios.
   - Provide a link to your social media channels in your staffs’ email signatures.
   - Cross-promote your social media channels on your other social media accounts, as applicable.

Step 2: Measure results and optimize performance.

1. Consider the following categories of social media measurement to report usage, monitor trends, and gauge the success of specific promotions or outreach efforts. This is not an exhaustive list of measures, and note that the terminology changes from channel to channel.
   - ***Exposure*** *(the reach of your channels to your audiences and others):* This includes visits, views, impressions, followers, fans, and subscribers.
   - **Influence** (the power of your channels among other accounts): This includes share of voice, sentiment, and top influencers.
   - ***Engagement*** *(the interaction of your audiences with your channels):* This includes clicks, reposts, shares, replies, messages, mentions, posts, comments, and shares.
   - **"Conversion"** (a marketing term that refers to your audience accomplishing the goal or taking the action you intended from using your channels): This includes content downloads, event attendance, funds raised, partners acquired, and study participants recruited. Consider these additional measures of conversion or outcomes:
     - use of the information you provide
     - health impact or behavior change
     - understanding of current issues, knowledge levels, and potential misunderstandings or myths about your health topic
2. Develop a procedure and schedule to review your metrics on a regular basis (e.g., complete a metrics reporting dashboard during the first week of every month for the prior month). *Hint:* You may also use the reporting tools inherent to the channels you chose to gain regular insight into the health of your overall accounts and individual posts.
3. Use the metrics to revise your approach, building on what is working and discontinuing what is not working.

4. After you develop a baseline of how your chosen channels perform, test different elements to determine if changes garner a lift in results. Testing topics can include, but are not limited to:
   - time of day content is posted
   - day of the week content is posted
   - timing of posts relative to the timing of the event or campaign (etc.) about which it is developed
   - format of content
   - CTAs used
   - links used
   - images and videos used
   - channel used (it may be worth starting the workbook again to branch out to a new channel)