



MSKTC Social Media Development Workbook



Model Systems
Knowledge Translation
Center

Translating Research into Rehab and Better Living

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Introduction

This **MSKTC Social Media Development Workbook** was developed to provide your Model System with a hands-on, step-by-step process to plan, execute, monitor, and optimize your social media activities. The workbook is the tool to help you to think through all the aspects that contribute to developing an efficient and effective approach. Each step includes space to write (or type) in your ideas and plans, and 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 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 a Social Media Plan** 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.



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

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)?

Action Item: SMART Goals

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.

Action Item: Top Three Goals

List the **top three goals** for your Model System's social media activities:



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, staffing, 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?

Action Item: Resources

Assign the staff members and determine the 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 editorial planning timeline/calendar		
Acquiring concept/campaign buy-in		
Reviewing concept/campaign		
Curating external content		
Curating internal content		
Creating monthly content calendars		
Package content selected		
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		



Step 3: Create an 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. What are relevant awareness days and/or holidays that you could promote?
4. Who will need to provide approval for your social media concept and campaigns?



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						
Fund-raising						
Observances						
Holidays						
Other						

	JUL	AUG	SEP	OCT	NOV	DEC
Campaigns						
Events						
Studies						
Fund-raising						
Observances						
Holidays						
Other						

Approved By: _____

Approval Date: _____

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

Describe your **current audience** (you may repeat this exercise for each audience your Model System 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 on your Model System (positive and negative).



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

8. Define their roles.
9. Define their interests/motivations pertaining to your Model System.
10. Define their online/communication behaviors.
11. Define how your Model System will serve them through social media.
12. Define how your Model System will use social media to overcome barriers to serving them.
13. Define how they will interact/engage with your Model System's social media.



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

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



Action Item: Personas

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

Step 5: Select Appropriate Channel(s)

Use the current audience analysis and the ideal audience personas from [Planning Step 4](#).



1. Name all of the channels your current Model System audience uses:
2. Name all of the channels **Persona 1** might use:
3. Name all of the channels **Persona 2** might use:
4. Name all of the channels **Persona 3** might use:
5. Name all of the channels **Persona 4** might use:
6. Name all of the channels **Persona 5** might use:

Action Item: Top Channels

Determine the top 1–2 channels you will use:

- 1.
- 2.

Step 6: Define Your Voice

1. What voice does your Model System currently use?

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

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



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

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



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

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

Check *all* of the ways social media will reflect your Model System's **purpose**:

- ☐ Engaging
- ☐ Educational
- ☐ Informative
- ☐ Enabling
- ☐ Convincing
- ☐ Amplifying
- ☐ Other _____
- ☐ Other _____
- ☐ Other _____



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—a sample monthly calendar is included in this workbook—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.



Step 1: Set Up Account(s) and Profile(s)

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

Action Item: 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)				

Action Item: Accounts to Follow

Identify 25–50 accounts to follow on each channel you are using.

CHANNEL 1	CHANNEL 2
MONTH #	



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 for 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?

Action Item: Content

Determine the sources from which you will regularly identify content.

FROM YOUR MODEL SYSTEM		FROM OTHERS	
Asset Name	Asset URL	Source Name	Source URL



Step 3: Create a Monthly Content Calendar

Plan to replicate this exercise each month. Identify the 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?

Action Item: Content Calendars

Create detailed content calendars for upcoming months.



Example: Monthly Content Calendar

MSKTC Social-Media-Development-Monthly-Content-Calendar.docx - Microsoft Excel												
K44												
	A	B	C	D	E	F	G	H	I	J	K	L
1	DAY/MILESTONE	TOPIC	CALL TO ACTION/GOAL	DRAFT COPY	IMAGE	LINK	AUTHOR	CREATION	REVIEWER	REVIEW	APPROVAL/REVISIONS	FINAL COPY
2	Monday, May 11	Stroke Awareness Month – Cooking Demo	Register	Learn how to cook for healthy living this Thursday! One of our dietitians will host a cooking demonstration at 6 in the 8th floor dining room. Reserve your space today: 312-238-4525 or hncaran@ric.nre	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 dietitians will host a cooking demonstration at 6 in the 8th floor dining room. Reserve your space today: 312-238-4525 or hncaran@ric.nre
3												
4	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/files/public/5195/83HM511.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!
5												
6	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 eat lunch!	Image of nurses at RMHC: "img-ricmatters-MealsHeart-20150513.jpg"	http://www.ric.org/news/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 eat lunch!
7												
8	Thursday, May 14	Stroke Awareness Month – Cooking Demo	Register	Kelly Niemaszyk, one of our dietitians, will host a 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-4-16-15.jpg"	N/A	Amber	Tuesday, May 5	Todd	Friday, May 8	Approved with no revisions	Kelly Niemaszyk, one of our dietitians, will host a talk and cooking demonstration on "Healthy Eating" tonight at 6 in the 8th floor dining room. Register: 312-238-4525 or
9												
10	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	Image of archery practice: "img-ricmatters-archery-1-20150513.jpg"	N/A	Amber	Tuesday, May 5	Todd	Friday, May 8	Approved with no revisions	RIC Sports is looking for assistance with the adaptive archery program. To get involved, please contact Jason Stubbeman



Step 4: Package and 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?

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?



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 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?

Action Item: Promotion

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

ONLINE OPPORTUNITIES	OFFLINE OPPORTUNITIES



Step 2: Measure Results and 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?

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]			

