

# Strategic Planning for Social Media Worksheet

## Format for a Strategic Plan

Include these elements in your document:

- Executive Summary
- Background/Situation Analysis
- Business Goals and Defining Success
- Integration of Social Media Tools with Traditional Means
- Resources Required
- Timeline for Implementation
- Budget
- Measurement
- Conclusion

*This worksheet provides key elements that should be included in any comprehensive social media plan. Answering the following questions will help you think through key issues while completing the Strategic Planning for Social Media Template.*

## Strategic Issues

### Business Goals

- What business outcome do you want to support or problem do you need to solve?
- How do you define success?

### Audience

- Who are your *current* key stakeholders or community members, a.k.a. “primary audience”?
  - What is the demographic mix of your audience (i.e., age, gender, race, ethnicity, socio-economic status)? If you don’t know, how will you get this information?
  - What are the general and health literacy levels of your primary audience?
- How, if at all, do you want this to change? What are the barriers to changing your primary audience?
- Who is your *current* secondary audience?
  - What is the demographic mix of your audience (i.e., age, gender, race, ethnicity, socio-economic status)? If you don’t know, how will you get this information?
  - What are the general and health literacy levels of your primary audience?
- Which additional audiences are important – and possible – for you to reach?
- Which special needs do your audiences have (e.g., visually/hearing impaired)? If you don’t know, how will you get this information?

### Social Media Goal(s) and Message(s)

- As a result of seeing you on and/or engaging with you via social media, what do you want audiences to:
  - Understand* about this project/initiative
  - Do* as a result of your social media efforts
- What are your key messages for each audience?
- How do you know your goals have been achieved?

*Please use the Strategic Planning for Social Media Template to help organize your responses.*

## Tactical Issues

### Choosing Tools

- Which social networking platforms would be most effective for connecting with your audience(s)?
  - Are you accounting for literacy levels and learning styles?
  - Do you know where, when and how often your audience(s) are online?
- How might social networking platforms coordinate with, support and enrich existing traditional means of communication?
- Would video be helpful?
- Is your potential audience already gathering on a particular platform?
  - Is your project sufficiently compelling that it could inspire online community members to try a new platform?
- Must your online community be exclusive/private, or may anyone have access to materials and discussions?
- Which digital tools are currently being used by your organization? Which seem to work well? Which need to be tweaked? Which need to be ditched?

<input type="checkbox"/> Blog	Keep/Tweak/Ditch
<input type="checkbox"/> Facebook group	Keep/Tweak/Ditch
<input type="checkbox"/> Facebook page	Keep/Tweak/Ditch
<input type="checkbox"/> Instagram	Keep/Tweak/Ditch
<input type="checkbox"/> Pinterest	Keep/Tweak/Ditch
<input type="checkbox"/> Twitter	Keep/Tweak/Ditch
<input type="checkbox"/> YouTube	Keep/Tweak/Ditch
<input type="checkbox"/> Other	

## Practical Issues

### Resources

- How many people do you need to implement this plan?
  - What skill sets will they need?
  - What training will they need?
- Are human resources already available within your organization?
  - Will you need senior management approval for engaging personnel in other departments?
- Will you need to hire outside contractors/consultants?
  - Will you need senior management approval to engage outside resources?
- Does your organization have the technological capability to implement this plan?
  - Is there a firewall situation you'll need to revisit?
  - Will you need to build/rebuild relationships with IT or other departments?

### Timeline

- By when do you want each element of your plan ready and functioning well?
- By when do you need each element of your plan ready and functioning well?
- Are there barriers to smooth, effective implementation? If so, how will you reduce/eliminate these barriers?

## **Monitoring and Measurement**

- How will you monitor each platform?
- Who will be responsible for monitoring each platform?
- How will you evaluate the success of your campaign?
- Who will be responsible for evaluating the success of your campaign?
- How will you measure behavioral change?
- How will you measure attitudinal change?
- Are there intermediate goals you could measure along the path to your ultimate goal?
- Who will be responsible for measuring outcomes?
- Can you convert any outcomes to a financial figure such as increased revenue or decreased costs so you could calculate ROI?

## **Budget**

- Which line items must be included?
- How much funding will you need for each line item?
- Which costs are one-time and which are ongoing?