Social Media Strategy Workbook
The 12-Step Guide to Creating Your Social Media Strategy
This Workbook will help you to define your goals and audiences and to decide on the channels that make the most sense for you.

Ready to figure out what social media means for you and your own organization? This Social Media Planning Workbook will help you to define your goals and audiences and to brainstorm the channels that make the most sense for you. Based on those channels, it helps you think through what you’re actually going to do, how much time it will take, and what some of your policies should look like.

Your Name: ____________________________  Today’s Date: ____________________________
Your Organization: ____________________________

1. SELF ASSESSMENT
Before we dive in, give some thought to the factors that will impact the social media channels that are likely to be useful to you. What are your assets? What are your resources? Use the questions below to help you.

1. How much time do you or your staff currently spend on marketing and communications tasks?

2. How much time do you expect to devote specifically to social media?

3. Which social media channels do you or your staff have experience with, either personally or professionally?
   - Facebook
   - Twitter
   - Blogging
   - Photo sharing sites (like Flickr)
   - Video sharing sites (like YouTube)
   - Other________________________
   - Other________________________

4. What assets are available to your organization?
   - Experienced writers
   - Experts in the topic area of your mission
   - Lots of organizational photos
   - Experienced photographers
   - Organizational videos
   - People with experience creating videos
2. SOCIAL MEDIA GOALS & OBJECTIVES

Before you can make decisions about which social media to use, you should be clear on your goals. Be specific—“reaching out to people” is too broad, for example. This type of goal will make identifying your strategy difficult and measuring your progress all but impossible.

We’ve created a list of sample goals to get you thinking about your own. Check off all of the reasons why you want to use social media with your organization.

<table>
<thead>
<tr>
<th>Research and Learning</th>
<th>Increased Relevant Visitor Traffic and Page Rankings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead generation</td>
<td>Letting supporters publicly support your cause</td>
</tr>
<tr>
<td>E-commerce sales</td>
<td>Disseminating information about an issue or topic</td>
</tr>
<tr>
<td>Store traffic</td>
<td>Recruiting new members, advocates or patrons</td>
</tr>
<tr>
<td>Increase Brand or Issue Awareness</td>
<td>Supporting a particular group of members, alumni, etc.</td>
</tr>
<tr>
<td>Reputation management</td>
<td>Tell stories about the work you do</td>
</tr>
<tr>
<td>Get your fans to talk about you (word of mouth)</td>
<td>Get press coverage</td>
</tr>
<tr>
<td>Reach a youth audience</td>
<td>Connect with other like-minded organizations</td>
</tr>
<tr>
<td>Promote an event</td>
<td>Changing hearts and minds on a particular topic</td>
</tr>
<tr>
<td>Build excitement prior to an event</td>
<td>Gathering photos or videos from supporters</td>
</tr>
<tr>
<td>Get people to take a particular action</td>
<td>Understanding what people are saying about you</td>
</tr>
<tr>
<td>Draw traffic to a particular online resource</td>
<td>Keeping up to date with a particular issue</td>
</tr>
<tr>
<td>Build your email list</td>
<td>Coordinating people in an action or a project</td>
</tr>
<tr>
<td>Solicit donations for your organization</td>
<td>Other___________________________</td>
</tr>
<tr>
<td>Get supporters to solicit donations for you</td>
<td>Other___________________________</td>
</tr>
<tr>
<td>Recruiting volunteers</td>
<td>Other___________________________</td>
</tr>
<tr>
<td>Branding your staff as experts on a cause or issue</td>
<td>Other___________________________</td>
</tr>
<tr>
<td>Getting your constituents to talk to each other</td>
<td>Other___________________________</td>
</tr>
<tr>
<td>Getting feedback from your constituents</td>
<td>Other___________________________</td>
</tr>
<tr>
<td>Keeping your supporters updated on happenings</td>
<td>Other___________________________</td>
</tr>
<tr>
<td>Building a community around an event or topic</td>
<td>Other___________________________</td>
</tr>
</tbody>
</table>

1. Now, restate your **TOP 3** objectives so that they are “SMART” – specific, measurable, attainable, realistic, and time-based.

2. Describe how your social media objective supports or links to a goal in your organization’s communications plan.
3. MEASURING YOUR GOALS

Now that you’ve identified your three most important goals for social media, let’s dive deeper to figure out what exactly you are looking for, how you can measure you work and what defines success. Determine what you would consider to be a “win” for each outlined objective—and how each will be quantified and connected to the bottom line.

Definitions of a “win” may include:

- Number of fans, followers, readers (or number of high-quality/targeted fans)
- Number of video or other content views
- Volume of user comments posted to your blog, profile or posted content
- Retweet or peer-sharing statistics for related content and posts
- Comment or retweet resonation (number of user comments multiplied by how many followers or friends each user has)
- Engagement (duration of video views, time spent on your blog site, time spent playing your branded game application, etc.)
- Media coverage
- Media impressions (mentions on blogs or other media multiplied by the size of the audience)
- Advertising click-through rates
- Company website traffic statistics
- Quantity of new qualified leads or sales
- Volume of customer service issues handled.

You may need to establish how these “wins” will be tracked, whether through the incorporation of unique URLs and discount codes, or through special tracking programs. For example, Google Analytics (http://www.google.com/analytics/) tracks referrals from the company’s social media profiles. And influence (http://www.twinfluence.com/) and Twitalyzer (http://www.twitalyzer.com/twitalyzer/index.asp) are Twitter-specific tools that measure how influential and far-reaching the company’s Twitter presence is. Klout (http://klout.com/) tracks the impact of your posted content and links, including which audiences are exposed to the content and how they interact with it.

Be sure to translate metrics into information about the financial impact on your business. This can take various forms, depending on your specific goals and internal key performance indicators:

- Financial return on investment
- Amount of new revenue generated
- Cost per lead
- Amount of money, time or other resources saved
For each of your goals, identify the following:

- What is the purpose? Why is this goal important? What will be the benefit for your organization?
- How is it measurable? Come up with two or three quantifiable measurements to help you gauge your success.
- What are you able to measure that will give you knowledge about your progress?
- What defines success? Identify a benchmark for each measurement that will help you figure out how well you did in accomplishing your goal.

<table>
<thead>
<tr>
<th>Goal</th>
<th>What is the purpose?</th>
<th>How is it measured?</th>
<th>What defines success?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>
4. DEFINING YOUR TARGET AUDIENCE

1. Who must you reach with your social media efforts to meet your objective? Why this target group?

2. Is this a target group identified in your organization’s communications plan?

3. What do they know or believe about your organization or issue? What will resonate with them?

4. What key points do you want to make with your audience?

When thinking about social media, it’s critical to specifically define the audience you want to reach. “The general public,” for example, is too vague. Each organization has many different types of constituents who can be reached through social media channels. The challenge is figuring out who you really want to reach.

In the diagram below, brainstorm a list of all your constituents in the outer box. (Having trouble coming up with constituent types? Use the word bank for ideas.)

<table>
<thead>
<tr>
<th>Alumni</th>
<th>Patrons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board members</td>
<td>People on your</td>
</tr>
<tr>
<td>Card holders</td>
<td>email list</td>
</tr>
<tr>
<td>Case managers</td>
<td>People on your</td>
</tr>
<tr>
<td>Clients</td>
<td>mailing list</td>
</tr>
<tr>
<td>Contributors</td>
<td>Potential donors</td>
</tr>
<tr>
<td>Customers</td>
<td>Press</td>
</tr>
<tr>
<td>Donors</td>
<td>Prospects</td>
</tr>
<tr>
<td>Event attendees</td>
<td>Resident experts</td>
</tr>
<tr>
<td>Families</td>
<td>Senior citizens</td>
</tr>
<tr>
<td>Former donors</td>
<td>Staff</td>
</tr>
<tr>
<td>Friends</td>
<td>Staff alumni</td>
</tr>
<tr>
<td>Grantees</td>
<td>Store patrons</td>
</tr>
<tr>
<td>Local businesses</td>
<td>Volunteers</td>
</tr>
<tr>
<td>Members</td>
<td>Visitors</td>
</tr>
<tr>
<td>Newsletter readers</td>
<td>Youth</td>
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<tr>
<td>Partners</td>
<td></td>
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<tr>
<td>Past</td>
<td></td>
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<tr>
<td>volunteers</td>
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</tbody>
</table>
5. UNDERSTANDING YOUR AUDIENCE – AUDIENCE SURVEY

You customer’s experience with your brand in social media should give them the same great feelings. Before you engage, however, you need to determine how much your customers are engaging in social media and on which sites. Here are five simple questions that you can ask your customers to determine how involved they are in social media. You can put these in a survey at the cash register, ask over the phone, put into an email, on your website or at any customer touch point.

1. Are you familiar with social media? Social media includes but is not limited to Blogs, Facebook, LinkedIn, Twitter, Podcasts, YouTube, etc.

2. If yes, which social media sites do you interact with? (List to top 10 - 12 social media sites and platforms)

| RSS Feeds and Readers: Bloglines, Google Reader, RSS on your website | Social bookmarking (or Social tagging & sharing) Delicious, StumbleUpon |
| Message Boards or Forums: Google Groups, forum on your website | Social news: Digg, Mixx, Reddit |
| Internet forums: vBulletin, phpBB | Opinion sites: epinions, Yelp |
| Micro-blogging / Presence applications: Twitter, Plurk, Pownce, Jaiku | Photo sharing: Flickr, Zooomr, Photobucket, SmugMug |
| Social networking: Facebook, LinkedIn, MySpace | Video sharing: YouTube, Vimeo, Revver |
| Social network aggregation: FriendFeed, Youmeo | Livecasting: Skype |
| Events: Upcoming, Eventful, Meetup.com | Product Reviews: epinions.com, reviews on your website |
| Q&A: Yahoo! Answers, LinkedIn Q&A | Virtual worlds: Second Life |

3. How much time do you spend engaging in social media per week?
   a. For personal use:
   b. For professional use:

4. What would motivate you to interact with our brand in social media? (things like coupons, contests, instructional videos, helpful content, etc.)

5. What other brands or organizations do you participate with in social media? This could take the form of blogs that you read, Facebook fan pages or Twitter feeds that you follow.

The quickest path from here to being a social media superstar is to begin engaging in the conversation by asking a few important questions and then listening. If you simply follow the 2:1 ratio of “ears to mouth”, you’ll be well on your way to being the most engaging and conversational organization in your category.

6. BRAINSTORMING TOOLS AND TACTICS
Each social media channel is good for something different. Consider the strengths and weaknesses of each tool against your goals in order to determine which channels are right for your organization.

Use the diagram to brainstorm. Write down your first social media goal and brainstorm the ways each channel could help you meet that goal. Repeat for your second goal, and then your third.
7. **HOW MUCH SOCIAL MEDIA IS RIGHT FOR YOU?**

Each social media channel is good for something different. Consider the strengths and weaknesses of each tool against your objectives stated earlier and come up with the answers to the following questions.

1. What tactics and tools best support your objectives and match your targeted audience?

2. Now, take a second look at what you are planning. What tactics and tools do you have the capacity to implement?

3. Are you prepared to allow additional time for researching new social media tools or changing tools?

Now, write in your goals on the chart below, and rate each channel as to how well they’re likely to help you meet them, on a scale of 1-5 (1=not very, 5=extremely). Also consider how easy it will be to create content, and how much experience you have with the channel.

<table>
<thead>
<tr>
<th></th>
<th>Goal #1:</th>
<th>Goal #2:</th>
<th>Goal #3:</th>
<th>Content: how easy will it be for you to produce the necessary content?</th>
<th>Expertise: how well versed are you or your staff in this channel?</th>
<th>Total</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td></td>
<td></td>
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<td></td>
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<td></td>
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<tr>
<td>Twitter</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Blogs</td>
<td></td>
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<tr>
<td>Video Sharing</td>
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<tr>
<td>Photo Sharing</td>
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<tr>
<td>Other</td>
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</tr>
</tbody>
</table>
8. SOCIAL MEDIA MARKETING INTEGRATION

Having a great social media presence is certainly one critical element in your overall marketing strategy, but social media should never stand alone. In fact, we often find that the best way to bring social media into an organization is in conjunction with and as an addition to an existing campaign or overall marketing strategy.

Physically integrating social media into your existing marketing tactics is relatively simple. Integration will really show you the value of social media by illustrating that the whole of social media + other marketing tactics can create a whole outcome far greater than the sum its parts.

1. How will your social media strategy support and enhance your marketing & Internet strategy?

<table>
<thead>
<tr>
<th>Strategy Component</th>
<th>How Does Social Strategy Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email</td>
<td></td>
</tr>
<tr>
<td>Web Site</td>
<td></td>
</tr>
<tr>
<td>Search Engine Optimization</td>
<td></td>
</tr>
<tr>
<td>Search Engine Advertising</td>
<td></td>
</tr>
<tr>
<td>Others:</td>
<td></td>
</tr>
</tbody>
</table>

2. How will you support/connect your offline marketing efforts with social media?
9. ENTERPRISE (DEPARTMENT) SOCIAL MEDIA INTEGRATION

The next generation in truly effective social media deployment will involve not just the Marcomm or PR team but will include the entire enterprise in its sights. Coming up with ways to leverage social media across the organization can be one of the most impactful things that you do with social media for your organization.

Take some time now to look at the following list of common corporate departments or lines of business and brainstorm how each of these areas could apply social media to their part of the business. You should also add departments or functions that are specific to your business and how social media could help them as well.

<table>
<thead>
<tr>
<th>Business Development</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Service</td>
</tr>
<tr>
<td>Research &amp; Development</td>
</tr>
<tr>
<td>Information Technology</td>
</tr>
<tr>
<td>Human Resources</td>
</tr>
<tr>
<td>Marketing</td>
</tr>
<tr>
<td>Public Relations</td>
</tr>
<tr>
<td>Legal/Risk Management</td>
</tr>
<tr>
<td>Training</td>
</tr>
<tr>
<td>Manufacturing</td>
</tr>
<tr>
<td>Field Sales</td>
</tr>
<tr>
<td>Inside Sales</td>
</tr>
<tr>
<td>Subsidiary Brands &amp; Offsite Locations</td>
</tr>
<tr>
<td>Dealers/Branches/Distribution Partners</td>
</tr>
<tr>
<td>OTHERS</td>
</tr>
</tbody>
</table>
10. SOCIAL MEDIA CULTURE CHANGE

Not every organization takes to social media like a duck to water. There are barriers, fears, concerns and a host of elements that can keep an otherwise forward thinking organization from engaging in social media. We’ll use this section to surface any of the concerns that you have about social media and map out a plan for bringing your organization up to speed with social media culture.

1. My concerns about using social media are. . .

2. How will you get your organization to embrace your social media strategy?

3. Can you think of any internal champions to drive it forward?

4. How will you address any fears or concerns?

5. What is the rate of change your organization can tolerate?

Top 10 Social Media Barriers:
1) Lack of internal resources/time
2) Lack of knowledge/expertise
3) Not convinced about the value/ROI
4) Lack of clear guidelines/policies
5) Lack of awareness of social media within company
6) Lack of budget
7) Social media not appropriate for company/brand
8) Fear negative reaction from customers
9) Lack of global reachSCALE
10) Lack of appropriate agency partner

Source: PRWeek Study
11. WHAT’S YOUR CAPACITY FOR SOCIAL MEDIA?

Social media marketing may be low-cost, but it does require time. Even for a company that does not actively participate, someone has to monitor what is being said about your organization and—assuming you don’t want to operate in a bubble—your competition. For businesses wanting to get actively involved, there is, of course, an even greater time commitment.

As a rule of thumb set aside at least two hours each week for every social media channel in your mix. If your time is limited to three hours or less per week start with a single channel that seems like the best bet for you. It’s far better to use one or two channels well than many channels poorly.

1. Who will implement your organization’s social media strategy?

2. Can you allocate a minimum of two hours per week / per channel to your strategy?

3. Do you need any outside expertise to help implement your strategy?

4. Will your content updates depend on any other resource or person? (Do they know your intentions?)

Posting frequency: Outline appropriate activity levels and posting frequency for increasing brand engagement.

For example, the British government, advises its civil servants to produce between two and 10 tweets per day, at least 30 minutes apart, in order to provide a continuous stream of content without inundating their followers. Blogs and such sites as Facebook tend to require less frequent postings but still call for several posts weekly.
12. YOUR FIRST SOCIAL MEDIA CAMPAIGN EXPERIMENT

As with any new marketing or business tool, you may find it helpful to define a structure for the ebb and flow of social media by organizing your strategy into campaigns and maintenance periods, much like you would an email communications or direct mail process. Dividing your strategy into a series of campaigns and maintenance will help make the continuous nature of social media more manageable for you and your staff, and enable you to more effectively measure success toward your goals.

When developing your strategy think in terms of two types of periods: your campaigns, and the time in between where you work to maintain your network.

Your campaigns:
- Have a defined beginning and end
- Are targeted to reach specific goals
- May encompass more tools than you maintain on a regular basis
- Should have specific targets to determine success
- Should be evaluated for effectiveness, once completed, to help you learn what works

Your maintenance periods:
- Will not have a prescribed start and end date
- Are targeted to reach specific goals
- Define the baseline level of time your organization will need to devote to social media
- Help you maintain your followers and fan base between campaigns

The worksheet on the following page will help you develop your first campaign, and to determine what your channel maintenance will look like.

1. What small piece can you implement first as a pilot?

2. Aside from the metrics described above, how will you track the implementation so you can learn from it?

3. Use the following table for analysis after you implement. Don’t focus so much on numbers but rather on insights.

<table>
<thead>
<tr>
<th>Test 1:</th>
<th>Before</th>
<th>After</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>What did you plan to do? What did you think would be the result?</td>
<td>What actually happened? How could your results have been improved? What did your audience think? What will you do differently in the next iteration?</td>
</tr>
</tbody>
</table>
## Campaign Plan

<table>
<thead>
<tr>
<th>Campaign</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Start</td>
<td>End</td>
</tr>
<tr>
<td>Goals</td>
<td></td>
</tr>
</tbody>
</table>

Who is your target audience?  

What tools will you use?  

What will success look like?  

How will you measure success?  

## Maintenance Plan

<table>
<thead>
<tr>
<th>Tool 1</th>
<th></th>
</tr>
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<tbody>
<tr>
<td>Who will manage?</td>
<td></td>
</tr>
<tr>
<td>Post frequency?</td>
<td></td>
</tr>
<tr>
<td>Types of info posted?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tool 2</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Who will manage?</td>
<td></td>
</tr>
<tr>
<td>Post frequency?</td>
<td></td>
</tr>
<tr>
<td>Types of info posted?</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Tool 3</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Who will manage?</td>
<td></td>
</tr>
<tr>
<td>Post frequency?</td>
<td></td>
</tr>
<tr>
<td>Types of info posted?</td>
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</tbody>
</table>

**Goals during maintenance**

1. To maintain and build audience for future campaigns  
2.  
3.  

Portions adapted from: WeAreMedia: *Nonprofit and Social Media Starter Kit* and the IdealWare *Social Media Decision Guide*
Section 1: Strategic Social Business Plan

1) Executive Summary
   a) As Is / To Be (regular business >> social business)
   b) Phases of Implementation
      i) Phase 1, 2, 3 – scheduled activities per phase
         (1) Immediate/Imperative
         (2) Easy to implement
         (3) Major initiatives
      ii) Phase goals
      iii) Phase benefits

2) Situation Analysis
   a) Why social media
   b) Key background information leading to the development of this plan
   c) Purpose of this plan
   d) Focus of this plan

3) Enterprise Goals & Objectives
   a) Desired outcomes
   b) Expected benefits

4) Strengths, Weaknesses, Barriers & Solutions
   a) Strengths to leverage
   b) Weaknesses to overcome
   c) Barriers
   d) Solutions to barriers

5) Competitive situation
   a) State of top competitors in social media
   b) State of the industry in social media
   c) Competitive differentiation
   d) Non-competitive, sector-relevant ideas/factors/models in social media

6) Line of Business Chapters (one page per LOB/department/division – references rest of the doc)
   a) One chapter for each line of business
   b) LOB Goals
   c) Recommendations
   d) Benefit
   e) Cost
   f) As Is / To Be
      i) Current process that social media will support/change/augment/replace
   g) Impact
      i) People
      ii) Process
      iii) Technology
      iv) Customers/Clients/Members
      v) Existing channel usage
Section 2: Social Media Strategy Section

7) Audiences
   a) Primary customer/client/member target audiences
   b) Demographics, technographics, psychographics
   c) Secondary target audiences
   d) Audience behaviors in social media & online media

8) Social media plan (matrix)
   a) Business Goal / Objective
      i) Purpose
         (1) Strategy
            (a) Tactics
               (i) Editorial recommendations
               (ii) Content creation & curation plan
                  1. (blog, slideshare, linkedin, twitter, etc)
                     a. Tactical plan per tool
                        i. Phased in approach
                        ii. Define Success

9) Social media governance
   a) Resources & capacity plan
   b) Team composition (cross functional)
   c) Policies
   d) Rules of engagement
      i) Internal & external
   e) Engagement Direction
      i) Listening & response recommendations
         ii) How, when, where to engage in social media

10) Training
    a) Recommendations & resources

11) Questions to be determined?
    a) How is the organization going to integrate social media into everyone’s life?
    b) How do we indicate measures of success w/out ROI
Social Media is simple, but not easy. I think that’s the best way to explain it. To that end, one of the best ways to drill down on what the best strategy is for your organization is to ask the right questions. It’s that simple!

In the absence of decades of best practices that are well known, universally understood and (hopefully) applied across industries, we have a set of questions that can help anyone, in any industry, get to the core of what their social media strategy should be and how they should proceed in making the most of social media.

It’s not about whether or not you should be on Facebook or have a YouTube channel - it all depends on the “answers to the questions”. If you ask me whether or not you should be on Twitter or whether you should be blogging or producing a podcast, it’s tough to say. However, I’m confident that by going through a process, asking the right questions and being confident in the outcomes, you’ll be on the right path to creating a best in class social media strategy.

The other thing to know about social media is that it’s changing. Fast. Just as someone once said about sports records, “today’s records are tomorrow’s averages”, you need to stay tuned to the changes afoot in social media because today’s breakthroughs are either going to be, at best, tomorrow’s best practices or at worst, lessons of what not to do.

All that having been said, let’s look at some questions:

**Setting Your Goals and Expectations for Social Media**
- How to we plan to measure the success of our social media efforts? (Qualitative and quantitative metrics)
- Who do you want to reach and why?
- What other benefits can you derive, such as creating a community with suppliers, vendors, and partners?
- What do we expect people to do with the social media tools that we roll out?
- What are we prepared to share with our audience in social media that doesn’t directly benefit the bottom line?
- What are our data do gathering objectives? (email, address, downloads only)
- Are we ok with not seeing an immediate and direct return on our social media investment?
- What are our short term and long term investment expectations?

**Industry Impact & Feasibility**
- How are social media impacting our industry’s customers and other stakeholders?
- Where are our competitors in social media? (conduct a competitive social media inventory analysis)
- What is the technology usage profile of our typical customer? How well/much do they use our website, email newsletter, etc?
- Do we believe social media will have an impact on our customers? In what way(s)? Why?
- Why is social media of interest to us?
- Is our industry ahead of the curve, behind it, or in the middle?
- Is discussion about our brand and our industry positive, negative, or neutral? Are we being talked about at all?
- Have we learned anything about our company or industry from listening to social media?
Social Media Strategy Questions

Assessing Our Corporate Social Media Readiness
- What is our company’s tolerance for risk (e.g., initiating new or untested marketing tactics, launching bold corporate initiatives, etc.)?
- How does our company normally react to negative commentary from the media, customers, competitors and other stakeholders?
- How uncomfortable would our company be advertising in a publication or on a web site that often contained editorial content critical of our company or industry yet whose readers very closely matched our target audience?
- Please rank your knowledge of social media in general – i.e., how familiar are you with various forms of social media and how they are used?
- How do you feel as a company about engaging in a public dialogue with your customers?
- What do you perceive as the biggest obstacles to our adoption of social media practices?
- What approaches can we take that are evolutions of our current practices (vs. complete overhauls)?
- Who on our staff is most enthusiastic and passionate about talking to customers?
- Who on our staff is most enthusiastic and passionate about social media?
- Can we first use social media to improve how we communicate internally, cross departmentally?

Determining Resources Needed for a Social Media Effort
- How much time and money are we expecting to dedicate to social media?
- What are we willing to spend for technology, development and social media tools?
- What level of human resources are we willing to dedicate to our social media plan?
- Who are the point people, and what are their roles? Who are the “faces” of the organization online, and where?
- Can we afford to keep part of our allocated $ budget flexible to respond to evolving needs?
- If we’re successful with social media, can we scale our interactions to continue to meet higher expectations? How?
- Are we flexible enough within roles/responsibilities to shift them as needed to accommodate what we learn from social media?

Social Media Specific Education and Training
- Are our employees using social networks in their personal lives?
- What level of familiarity can/should we expect from our employees and what gaps do we need to fill with training?
- Does our internal audience understand the business potential of social media?
- What are the biggest fears/hesitations that we have as a company about using social media?
- Are we empowering our employees to respond at the point of need, regardless of their role? Is there a “chain of command”?
- How are we going to structure the flow of information so that necessary learnings get back to the right people?
Social Media Strategy Questions

Participating and Engaging in Social Media
- What is our “unique voice” and “point of view” that we want to take to the social media conversation?
- What practices do we see from our peers/competitors that we’d like to emulate?
- What do we see from them that we’d like to avoid at all costs?
- What unique voice can we contribute to the conversation in the industry?
- What is it that we want to convey to our community through our participation in social media?
- Are we going to encourage community generated content?
- Do we plan to heavily moderate or edit community contributed content or let it stand & play out?
- How are we ensuring that we’re providing a two-way channel for dialogue?

Social Media Policy & Crisis Communication Planning
- What direction or advice should you offer about people’s conduct on personal pages after (and, sometimes, during) business hours?
- What is our policy for handling social media feedback?
- What is our policy for our employee engagement in social media? Are we covered by our ethics, computer usage, code of conduct of HR policies or do we need a specific social media policy?
- How will we respond to negative feedback/criticism when we discover it?
- Are we ready to empower our team to resolve customer issues in social media channels?
- How detailed do we need to be with our communication policies?
- Who is to speak “officially” about your organization, and about which topics?
- Who are the people who can promptly grant permission to discuss new products and industry trends, and what can you share?
- What’s the process for responding to legitimate (and illegitimate) online criticisms of your company or its products? What can you do to prevent (or survive) a Twitterstorm or any social media crisis?
- How can people “authentically engage in the conversation” as individuals without speaking for the company?

Following-up On Our Social Media Strategy Implementation
- What social sites are working for us, based on the objectives we’ve stated?
- Which social sites and channels are easy to interact in and responsive to our message and which ones do we have to “force”?
- What has emerged from our social media interaction and conversations that we hadn’t anticipated?
- What are we doing with the information we learn?
- How are we distributing it internally and acting on it?
- What new metrics should we be tracking based on what we’ve learned?
- Were our original assumptions about social media correct? If not, what do we need to adjust as a result?
- What have we learned from our customers and competitors that we didn’t know before?
- What’s next?

Remember, none of us has all of the answers, all of us are smarter than any of us and our job here is not to deliver all of the right answers on social media but rather to ensure that we’re asking the right questions.
• **Instructional** - Instructional posts tell people how to do something. I find that my Tips posts are generally the ones that are among my most popular both in the short term (ie loyal readers love them and will link up to them) but also in the longer term (ie one of the reasons people search the web is to find out how to do things and if you can rank highly with your tips post you can have traffic over a length of time).

• **Informational** - This is one of the more common blog post types where you simply give information on a topic. It could be a definition post or a longer explanation of some aspect of the niche that you’re writing on. This is the crux of successful sites like [wikipedia](https://www.wikipedia.org).

• **Reviews** - Another highly searched for term on the web is ‘review’ - I know every time I’m considering buying a new product that I head to Google and search for a review on it first. Reviews come in all shapes and sizes and on virtually every product or service you can think of. Give your fair and insightful opinion and ask readers for their opinion - reviews can be highly powerful posts that have a great longevity.

• **Lists** - One of the easiest ways to write a post is to make a list. Posts with content like ‘The Top Ten ways to…..’, ‘7 Reasons why….’, ‘5 Favorite ….’, ‘53 mistakes that bloggers make when….’ are not only easy to write but are usually very popular with readers and with getting links from other bloggers. One last tip on lists - if you start with a brief list (each point as a phrase or sentence) and then develop each one into a paragraph or two you might just end up with a series of posts that lasts you a few days.

• **Interviews** - Sometimes when you’ve run out of insightful things to say it might be a good idea to let someone else do the talking in an interview (or a guest post). This is a great way to not only give your readers a relevant expert’s opinion but to perhaps even learn something about the topic you’re writing yourself. One tip if you’re approaching people for an interview on your blog - don’t overwhelm them with questions. One of two good questions are more likely to get you a response than a long list of poorly thought through ones.

• **Case Studies** - Another popular type of post here at ProBlogger have been those where I’ve taken another blog and profiled them and how they use their site to earn money from their blogging. Sometimes these are more like a review post but on occasion I’ve also added some instructional content to them and made some suggestions on how I’d improve them. Case studies don’t have to be on other websites of course - there are many opportunities to do case studies in different niches.

• **Profiles** - Profile posts are similar to case studies but focus in on a particular person. Pick an interesting personality in your niche and do a little research on them to present to your readers. Point out how they’ve reached the position they are in and write about the characteristics that they have that others in your niche might like to develop to be successful.

• **Link Posts** - The good old ‘link post’ is a favorite of many bloggers and is simply a matter of finding a quality post on another site or blog and linking up to it either with an explanation of why you’re linking up, a comment on your take on the topic and/or a quote from the post. Of course adding your own comments makes these posts more original and useful to your readers. The more original content the better.

• **‘Problem’ Posts** - I can’t remember where I picked this statistic up but another term that is often searched for in Google in conjunction with product names is the word ‘problems’. This is similar to a review post (above) but focuses more upon the negatives of a product or service. Don’t write these pieces just for the sake of them - but if you find a genuine problem with something problem posts can work for you.

• **Contrasting two options** - Life is full of decisions between two or more options. Write a post contrasting
two products, services or approaches that outlines the positives and negatives of each choice. In a sense these are review posts but are a little wider in focus. I find that these posts do very well on some of my product blogs where people actually search for ‘X Product comparison to Y Product’ quite a bit.

• **Rant** - get passionate, stir yourself up, say what’s on your mind and tell it like it is. Rants are great for starting discussion and causing a little controversy - they can also be quite fun if you do it in the right spirit. Just be aware that they can also be the beginnings of a flaming comment thread and often it’s in the heat of the moment when we say things that we later regret and that can impact our reputation the most.

• **Inspirational** - On the flip side to the angry rant (and not all rants have to be angry) are inspirational and motivational pieces. Tell a story of success or paint a picture of ‘what could be’. People like to hear good news stories in their niche as it motivates them to persist with what they are doing. Find examples of success in your own experience or that of others and spread the word.

• **Research** - In the early days I wrote quite a few research oriented posts - looking at different aspects of blogging - often doing mind numbing counting jobs. I remember once surfing through 500 blogs over a few days to look at a number of different features. Research posts can take a lot of time but they can also be well worth it if you come up with interesting conclusions that inspire people to link up to you.

• **Collation Posts** - These are a strange combination of research and link posts. In them you pick a topic that you think your readers will find helpful and then research what others have said about it. Once you’ve found their opinion you bring together everyone’s ideas (often with short quotes) and tie them together with a few of your own comments to draw out the common themes that you see.

• **Prediction and Review Posts** - We see a lot of these at the end and start of the year where people do their ‘year in review’ posts and look at the year ahead and predict what developments might happen in their niche in the coming months.

• **Critique Posts** - ‘Attack posts’ have always been a part of blogging (I’ve done a few in my time) but these days I tend to prefer to critique rather than attack. Perhaps it’s a fine line but unless I get really worked up I generally like to find positives in what others do and to suggest some constructive alternatives to the things that I don’t like about what they do.

• **Debate** - I used to love a good debate in high school - there was something about preparing a case either for or against something that I quite enjoyed. Debates do well on blogs and can either in an organized fashion between two people, between a blogger and ‘all comers’ or even between a blogger and... themselves (try it - argue both for and against a topic in one post - you can end up with a pretty balanced post).

• **Hypothetical Posts** - I haven’t done one of these for a while but a ‘what if’ or hypothetical post can be quite fun. Pick a something that ‘could’ happen down the track in your industry and begin to unpack what the implications of it would be. ‘What if....Google and Yahoo merged?’ ‘What if …’

• **Satirical** - One of the reasons I got into blogging was that I stumbled across a couple of bloggers who were writing in a satirical form and taking pot shots at politicians (I can’t seem to find the blog to link to). Well written satire or parody can be incredibly powerful and is brilliant for generating links for your blog.

• **Memes and Projects** - write a post that somehow involves your readers and gets them to replicate it in some way. Start a poll, an award, ask your readers to submit a post/link or run a survey or quiz.