

# The All-in-One Social Media Workbook

The tools, networks, and tactics you need to succeed

## Assess your social media presence

Before you create a social media marketing plan, it's important to conduct a social media audit. Taking stock of your current social media accounts and networks, as well as the number and efficacy of users and owners, will help you understand what efforts are working—and what are not. You can then pare down on inactive accounts, give permissions to responsible users, and begin your strategy with a clean slate.



**Social Media Audit Template**

This template is to help you conduct a social media audit for your business. Follow these steps to execute your next social media audit.

**Step 1**  
Create a spreadsheet and write down all the social networks you own and the owner for each.

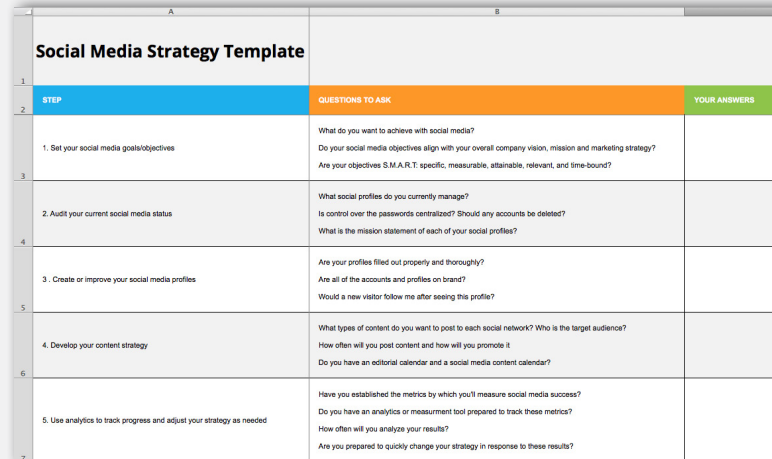
Social Network	URL To Profile	Owner

**Step 2**  
Go on [Google](#) and search up any other social media profiles that is representing your company that you don't own (imposters). Create a separate spreadsheet.

Social Network	URL	Owner	Shutdown Y/N

## Social media strategy template

Use this template to create a social media strategy to guide your daily activities. Answer key questions about your social media objectives, current status and profiles, content strategy, and how to measure success.



Social Media Strategy Template		
STEP	QUESTIONS TO ASK	YOUR ANSWERS
1. Set your social media goals/objectives	What do you want to achieve with social media? Do your social media objectives align with your overall company vision, mission and marketing strategy? Are your objectives S.M.A.R.T. specific, measurable, attainable, relevant, and time-bound?	
2. Audit your current social media status	What social profiles do you currently manage? Is control over the passwords centralized? Should any accounts be deleted? What is the mission statement of each of your social profiles?	
3. Create or improve your social media profiles	Are your profiles filled out properly and thoroughly? Are all of the accounts and profiles on brand? Would a new visitor follow me after seeing this profile?	
4. Develop your content strategy	What types of content do you want to post to each social network? Who is the target audience? How often will you post content and how will you promote it? Do you have an editorial calendar and a social media content calendar?	
5. Use analytics to track progress and adjust your strategy as needed	Have you established the metrics by which you'll measure social media success? Do you have an analytics or measurement tool prepared to track these metrics? How often will you analyze your results? Are you prepared to quickly change your strategy in response to these results?	

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Social Network	URL	Owner	Shutdown Y/N



## Step 3

Evaluate the needs for all your social media profiles and create a mission statement for each. For example: Instagram Profile—To share company culture and company achievements.

Social Network	URL to Profile	Owner	Mission Statement



## Step 4

Make sure all your accounts are on brand. Proper profile photo, cover photo, icons, bios and descriptions are proper, and URL is correct.

Social Network	URL to Profile	Owner	Mission Statement	Branding Check Y/N



## Step 5

Centralize the ownership of passwords.

For example: have your IT department own the key to all the passwords for the social media profiles. Use a tool like LastPass to share access on a need to use basis.

Social Network	URL to Profile	Owner	Mission Statement	Branding Check Y/N	Password Centralized Y/N



## Step 6

Create a process for how new channels will be established going forward and create a criteria. Make sure to also take note of who is going to approve the requests.

For example:

- Requester:
- Who is the target audience?
- What type of content will be posted in this profile?
- Who is going to respond to content?

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## 4 key strategy considerations









**Understand who your customer is** and where to find them online. *My audience is comprised of women aged 25 to 35, so the primary social networks I should focus on (at least initially) are Facebook, Twitter, Pinterest, and Instagram.*

**Create a mission statement** for each social profile's purpose, tying this back to your business goals. Ex: I will use Twitter for customer service in order to promote customer loyalty.







**Set a goal** for each social profile and identify benchmarks for success. Ex: I want to increase new follower count on Facebook by 50 each month to amplify my brand and drive foot traffic to my brick-and-mortar business.

**Develop a content strategy** for each profile. Ex: I want to post 2 unique images on Instagram each day to increase engagement and positive sentiment around my brand.

### Popular social networks

	Network	Number of users	Demographic information		More information
	Facebook	1.28 billion users	65% female / 35% male	48% of users aged 18-34, 31% aged 35-54	Social network leader with largest audience, large focus on interaction with friends and family
	Twitter	255 million users	62% female / 38% male	66% of users aged 15-34	Open network geared towards conversations via short messages (140 characters maximum)
	LinkedIn	300 million users	39% female / 61% male	60% of users aged 25-54	Social network geared towards building professional connections to aid career development
	Google+	1 billion users	30% female / 70% male	All users have Google accounts	Social network arm of Google's product offering, heavy visual focus.
	Pinterest	70 million users	83% female / 17% male	45% of users between 35-54	A place to build virtual collections of visual content pertaining to personal interests
	Instagram	300 million users	68% female / 32% male	90% of users under 35 years old	Platform for sharing visual content
	YouTube	1 billion users	Reaches more U.S. adults than any cable network	Predominant user base is 18-34 years old	Platform for hosting and sharing video content
	Foursquare	45 million users	40% female / 60% male	80% of users between 18-43 years old	Social network focused on geo-location based interaction

## Best practices for top social networks

	Network	Focus	Frequency	Tip
	Facebook	Quality	5-10 per week	Aim for 2 posts per day to keep audience interested
	Twitter	Quantity	3-5 per day	One per hour is optimal
	LinkedIn	Formal, technical content	2-5 per week	LinkedIn posts get more traction during the work week
	Google+	Content relevancy	1 per day	Your posts give Google more content to index and enhance SEO rankings
	Pinterest	Compelling storytelling through images	3-4 per day	Pin both original content and repin engaging content from other users
	Instagram	Rich imagery	1-2 per day	There is no real fatigue with posting but ensure consistency week after week

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## Content strategy checklist

Understanding your brand's identity is an important first step to deciding on the content you should source or create. The answers to the following questions will inform your brand guidelines, which in turn influence your content strategy.

1. What is your brand positioning and voice?
2. What issues are important to your brand?
3. How do external parties refer to your brand, such as the media, industry experts, etc?
4. What is your community interested in when they aren't talking about your brand or directly to you?
5. Historical performance: What content has worked and what hasn't?
6. Search behavior: What do people search for when they are looking for your brand's products and services?

## Why do I need a content calendar?

Planning, creating, and publishing content can be stressful and difficult to maintain if you aren't organized. We recommend creating a **content calendar** that brings all the necessary information into one easily accessible place. You will then be able to see everything at a glance—channels, authors, content types, topics, dates—and allocate resources accordingly.

Once your calendar is in place and is being used for a period of time, you'll be able to:

- See what content connects with your audience, and what is missing the mark, so you can adjust future plans for best results.
- Keep your contributors busy, but not overwhelmed. Resource allocation can be a real challenge, and a good content calendar will take the guesswork out of assigning tasks to the right people at the right times.

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### How to develop a content calendar

Decide on dates, times, author, audience for blog posts and social content.

Tie your content calendar closely to your business goals. For example, if your LinkedIn account is meant to drive leads, focus on lead generation content.

Create a content matrix that defines what percentage of your content is allocated to different types of posts. Consider breaking it down like this example, but using your own content types and overall social media strategy goals:

- 50% of content links back to the blog
  - 25% curated from another source
  - 20% drives content related to your business
  - 5% is related to HR and company culture
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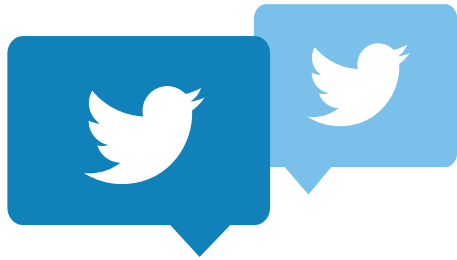






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## 5 strategies that will help drive engagement



1. Create dialogue with your customers by following up on comments on your published content.
  - a. Build a private list of Twitter users you've engaged with and continue to build on those relationships. There is great potential to turn contacts into customers.
  - b. Engage in deep listening.
    - i. Monitor for @mentions and be timely. 71% of consumers who receive a quick brand response are more likely to recommend that brand to others.
    - ii. Listen to keywords relevant to your brand and industry, and proactively reach out to potential customers.
2. Measure what content your audience is engaging with most to learn what works.
3. Share, mention, and compliment other people's content that you like. You will create new relationships and add value to your own content by showing that you're engaged as well.
4. Attach images to your Tweets to help improve engagement. Tweets with photos average a 35% boost in retweets.
5. Participate in Twitter Chats to learn from others and converse with your audience.

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### Tips on how to increase engagement

#### Twitter:

Tweets that contain photos average a 35% boost in retweets. Remember to keep messages at least 20 characters under the limit to allow for retweets and comments.

#### Facebook:

Short text posts are being favored by Facebook's algorithm, which means they show up more frequently. However, the algorithm may change—and your audience may change how they interact with Facebook posts that use shorter amounts of text—so it's worth adjusting your engagement strategy as needed.

#### LinkedIn:

Engage your audience by asking relevant questions and be sure to follow up on comments as soon as possible to keep the conversation going, whether the comments are on your company page, in specific groups, or your published posts.

#### Google+:

Try posting "how-to" posts tailored to your audience, as these have been shown to be most successful on the Google+ platform.

#### Instagram:

Remember: you're posting about your brand, so share authentic, brand-specific "insider" photos for higher engagement rates.

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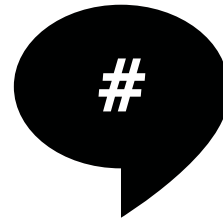
## Hashtags for brand awareness

Create a hashtag specific to your business and use it as your central business tag on every social channel (ex: KitKat uses #HaveABreak to connect the traditional candy bar slogan with the company's social efforts).

Encourage people to share your hashtag. When your customers share photos of your product, you receive authentic images of real people enjoying your business.

Monitor the hashtag across your social networks and engage with or respond to customer mentions. Quick action is integral: customers expect immediate responses on Twitter (1 to 2 hours).

Create campaign-specific hashtags to spread the word on contests or promotions.



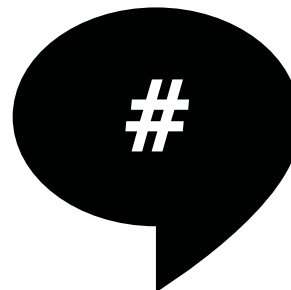
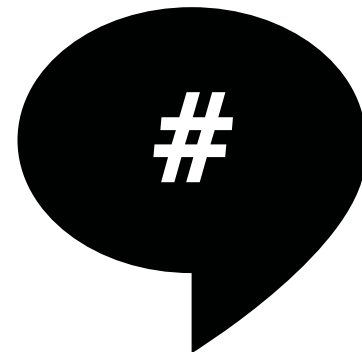
## How to discover trending content

Hashtags are a great way to discover what people are talking about on social media. It is important, though, to know the dangers of wading into a topic that could turn negative.

Find trending topics on Twitter and Google+ -- these trends are often happening simultaneously on Facebook and Instagram.

Tag relevant keywords relating to a product or service (*#roomforrent*), lifestyle (*#recipeoftheday*), event (*#TEDTalk*), or location (*#EastVan*) to expand your reach to a qualified user group searching for this type of content.

Be specific with your hashtags. Targeting a smaller audience interested in your topic gives you a greater chance of improving engagement and sentiment around your brand.



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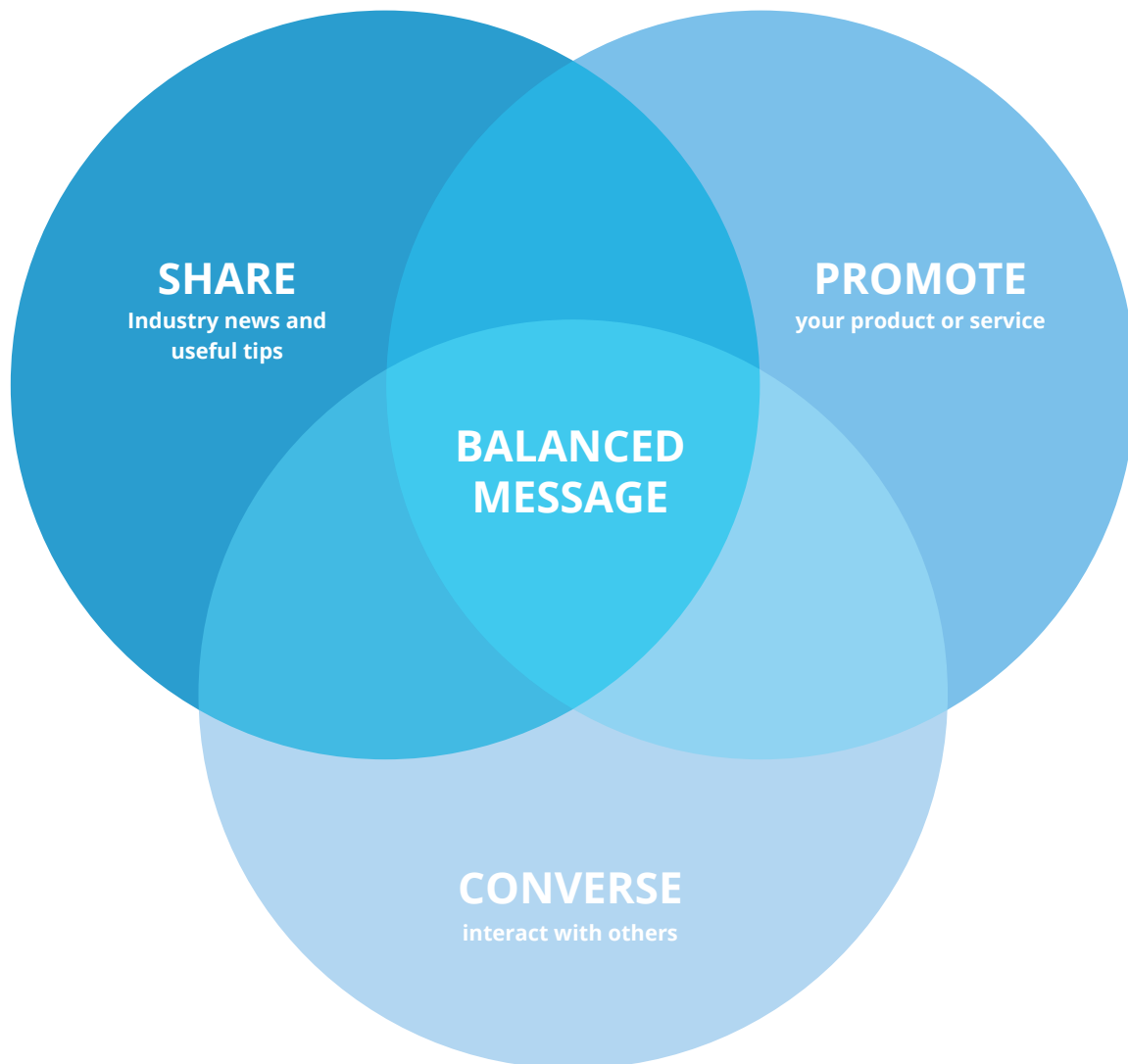
## Pro Tip

Develop and nurture your following without burdening the audience by following the rule of thirds when it comes to social content:

- 33% should promote your business, convert readers, and generate profits.
- 33% should surface and share ideas from thought leaders/pioneers in your industry or like-minded businesses.
- 33% should be based on conversing with others and building your brand through engaging with people.

Sticking to the rule of thirds will keep your audience engaged, informed, and interested in what you have to say.

### The Rule of Thirds:



# 9-STEP COMMUNICATIONS STRATEGY

Communications plans are similar to business plans: the difference lies in the disciplines applied to a plan's execution. You can build a classic communications strategy plan based on this 9-point roadmap.

<b>PROJECT NAME</b>		
<b>CONTACT INFO</b>	<b>NAME</b>	
	<b>PHONE</b>	
	<b>EMAIL</b>	
	<b>MAILING ADDRESS</b>	
<b>DATE:</b>		<b>AUTHOR:</b>

<b>1</b>	<b>MISSION</b>
Whether you are working on an overall communications plan for your organization or have a project, campaign, or crisis communications planning situation to execute, begin with your mission in mind.	

<b>2</b>	<b>EXECUTIVE SUMMARY</b>
A concise summary of the full plan, highlighting the key strengths and weaknesses, major goals, and primary techniques to be employed	

<b>3</b>	<b>SITUATION ANALYSIS</b>
<b>RESEARCH</b>	
PEST Analysis (political, economic, social, and technological factors)	
SWOT Analysis (strengths, weaknesses, opportunities, and threat factors)	
Competitor Analysis	

**IDENTIFY SMART (specific, measurable, realistic, and timely) OBJECTIVES & METRICS**

**4**

**STAKEHOLDER & TARGET AUDIENCES**

This is a prioritized list of target groups and their subgroups of key influencers, as well as those you want to influence with your plan.

**5**

**KEY MESSAGES**

A group of three-to-five statements which sum up how you want your organization to be perceived

*If you are targeting multiple audiences that require differentiated messages, you will need to create a list of three to-five-statements based on each audience.*

**6**

**TOOLS & TACTICS**



What do we have to do to achieve objectives, and what tools are appropriate to reach your target audience?

### COMMUNICATIONS CHANNELS

*Each audience will likely have several appropriate communications channels that will require a plan and budget: web/online media presence, press/PR, direct marketing, and paid advertising on print or broadcast media.*

7

### BUDGETS

Each tactical project that supports the plan should be budgeted separately.

8

### PROJECT PLAN & SCHEDULES

Create a milestone chart that will show all tactics and what needs to be done by whom and by when. Include this so that you can measure progress toward ultimate goals.

TASK OWNER	DATE DUE	TASK DESCRIPTION

9

### EVALUATE

Based on your mission and incremental metrics, evaluate how successful you were in meeting objectives.

## S.M.A.R.T. Goals Template

Crafting S.M.A.R.T. Goals are designed to help you identify if what you want to achieve is realistic and determine a deadline. When writing S.M.A.R.T. Goals use concise language, but include relevant information. These are designed to help you succeed, so be positive when answering the questions.

**Initial Goal** *(Write the goal you have in mind):*

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**1. Specific** *(What do you want to accomplish? Who needs to be included? When do you want to do this? Why is this a goal?)*

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**2. Measurable** *(How can you measure progress and know if you've successfully met your goal?):*

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**3. Achievable** *(Do you have the skills required to achieve the goal? If not, can you obtain them? What is the motivation for this goal? Is the amount of effort required on par with what the goal will achieve?):*

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**4. Relevant** *(Why am I setting this goal now? Is it aligned with overall objectives?):*

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**5. Time-bound** *(What's the deadline and is it realistic?):*

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**S.M.A.R.T. Goal** *(Review what you have written, and craft a new goal statement based on what the answers to the questions above have revealed):*

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