

Social Media Strategy Worksheet

*Adapted from the Social Media Strategy Worksheet by Convince & Convert

What's your pitch?:

In this step, you need to describe your business. You must be able to describe the value of your organization in one sentence without regurgitating your mission statement before you start using social media.

What's the point? (awareness, donations, attracting volunteers, something else?):

Trying to do too much in social media makes your messaging muddled and confuses your fans. Focus on one goal at first, then switch to something else after a while. Do not try to attack multiple goals simultaneously. Pick one of the above goals and go for it. When you've achieved that goal, move to something else. Does it seem that the Washington community doesn't know what your organization does? Your goal should be awareness. Do you have a lot of followers, but they rarely or never make donations? Then your goal should be to increase donations to the organization. Does your organization have a lot of events and is constantly short-staffed? Then your goal needs to be recruiting volunteers. Or is there a totally different reason behind your organization wanting to get involved in social media?

What's your current relationship with the audience? (nothing, awareness but no action, single action, repeat actions, advocates):

Where are the majority of your followers on the above spectrum? Which audience members are you trying to reach with your social media efforts? You must be specific in this step because what your audience already knows about you dictates what you can credibly have a conversation about via social media. Pick no more than two of the above audience segments.

How does your audience use social media? (creators, conversationalists, critics, collectors, joiners, spectators, inactives- see attached page for descriptions of each):

Respect where your audience is in the social media usage spectrum and don't expect them to operate outside their comfort zone. Determine how your audience behaves with that technology. You may have to guess on this a bit, but it might be worth surveying a sampling of your followers at some point to find out exactly how they like to use social media. Tools like

survey monkey offer easy, free survey tools that allow you to send short surveys to your followers. Check it out!

What will make your presence unique? What's your "one thing"?:

You need to identify the one thing about your organization that makes it truly interesting and special. Give people something intriguing to talk about!

How will you be personable? How will you be human vs. a faceless online presence?:

Your social media presence shouldn't make your audience wonder what your organization is all about. It should have a literal or figurative face on your brand in at least one way in order to really grasp the point of participating in social media.

What are the top three metrics you'll track? How will you track them?:

Pick three metrics that matter to your organization and measure them consistently and well. Facebook provides "Facebook Insights," a metric monitoring program that allows you to track how many times your page is viewed, demographics of your followers, what your most viewed content is, etc. It's a great tool and should be used as much as possible. Twitter doesn't offer a monitoring program which is why it's good to encourage your followers to mention your twitter handle (a.k.a. username), in their tweets. For example, when you tweet about WCCF Gives Day, mention #WCCFGives and @WashCoCommFdn in your tweet so WCCF can track the mentions of the event. Monitoring your social media presence helps you determine if what you're doing with your presence is working the way you want it to or not and provides insight into what could be improved to get a greater ROI.

Descriptions of Audience Members

Creators: publish blogs, publish their own web pages, upload videos/music they created, write articles or stories and post them. About 24% of all United States adults online are creators.

Conversationalists: update status on social networking sites, post updates on Twitter and do so at least weekly. About 33% of all U.S. adult social media users are conversationalists.

Critics: post ratings, reviews of products or services, comment on someone else's blog, contribute to online forums, contribute to/edit articles in a wiki. About 37% of all U.S. adults online are critics.

Collectors: use RSS feeds to stay up-to-date on people, organizations, etc. they like, cast votes and participate in online contests, add "tags" to Web pages or photos. About 20% of all U.S. adults online are collectors.

Joiners: maintain profile on a social networking site, visit social networking sites, little to no action on them. About 59% of all U.S. adults online are joiners.

Spectators: read blogs, listen to podcasts, watch video from other users, read online forums, read customer ratings/reviews, read tweets. About 70% of all U.S. adults online are spectators.

Inactives: none of the above, doesn't participate in social media in any capacity. About 17% of all U.S. adults online are inactives.

*Statistics were taken from Forrester Social Technographics Ladder, established 2009 and updated 2010.