

Social media checklist

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|----|---|
| 1 | Setup business's goals and objectives |
| 2 | Smart content planning & scheduling |
| 3 | Integrated content management |
| 4 | Organic & paid for publishing |
| 5 | Social monitoring |
| 6 | Trend tracking |
| 7 | Efficient response management |
| 8 | Online security, & risk management |
| 9 | Analytics & reporting |
| 10 | SCRM built for ongoing marketing strategy |

What is a social media strategy? And what should you look for?

Marketers and business owners are tasked with a difficult social media challenge.

But it doesn't have to be a daunting task – you can get a focussed strategy by understanding what your audience needs and wants are. Get rid-off unclear objectives, tactics and numerous metrics that just add confusion and stress.

It's time to **ground your social media initiatives with a strategic plan** that makes goals, tactics and measurement clear and easy to follow.

Before diving into tactics, you'll need to define social media goals, then align them with business objectives.

"80 percent of marketers (incorrectly) begin with tactics instead of goals."
-eMarketer Report

Foreword

Sir Richard Branson once said - “learning from other people's business successes and failures can be an essential part of your own success.”

The 21st century has shown how the balance of power has shifted to the customer. Businesses no longer dictate what the consumer should do. The solution is simple - we need to listen, engage and discover our customer's needs. Some smart brands just focus their marketing efforts on producing clever content that their fans freely and gladly download and share with others.

Get the idea?

We've developed the following **checklist framework** because we'd like to help you see through the must-do's, don'ts and have's for an **effective social media strategy** and its tactical implementation.

These proven steps will accelerate, improve and/or increase your business conversion rates by:

- ✓ Presenting you with clear (proven) organised steps
- ✓ Design and effectively plan your social strategy and campaign tactics
- ✓ Bringing you valuable data insights into content creation and publishing
- ✓ Helping you to segment your audience, including influencers and brand advocates
- ✓ Discover new market trends to effectively manage, moderate and engage with your social communities.

Benefits

- ✓ Empower, help and educate customers, leads, who naturally become brand ambassadors
- ✓ Increase traffic to website through inbound links, shares and higher SEO rankings
- ✓ Build stronger and durable customer relationship with your brand
- ✓ Establish yourself as thought leader
- ✓ Improve your service delivery
- ✓ Reduce customer complaints

Let's strategise it!

1. Creating and mapping Social Media Strategy

Start social media planning like any other strategic plan.

My favorite method is using a "**Who > Why > What > How and When**" model to build a cascading tree for "Mission > Scope > Goals > Tactics".

| Activity | Yes | No |
|---|-----|----|
| Have I clearly defined my business mission? ¹ | | |
| Have I set clear goals for each campaign? | | |
| Who will be using social media? | | |
| Have I drawn up specific strategies for each department/function? ² | | |
| Have I decided how we'll measure goal success? ³ | | |
| Have I defined my audience? | | |
| Have I segmented my audience? | | |
| Do I understand what their needs and wants are? | | |
| Have I brainstormed strategies for each of them? | | |
| Have I decided on tactics (based on strategy) for each of the groups? | | |
| Have I decided how many resources will be needed? | | |
| Have I drawn-up different strategies for different segments, or will I just use different messages and mediums? | | |
| Have I selected primary channels of communication? | | |
| Have I setup secondary channels of communication? | | |
| Have I completed the social media campaign briefing? | | |

Notes:

1 Mission statement

2 Small-Medium size business

3 S.M.A.R.T Goals

2. Create Smart Content, Planning & Scheduling

Successful agile social teams must constantly plan and deploy the most relevant content for different, and sometimes various audiences across any number of social channels. So you should always ask yourself the following:

| Activity | Yes | No |
|--|-----|----|
| Have I planned content for every single type of audience? | | |
| Did I listen (properly) to my audience's problems or questions? | | |
| Am I helping or giving them what they need to solve their problems? | | |
| Did I create relevant posts for multiple marketing channels? (in advance) | | |
| Have I scheduled relevant content (accordingly) across all social media network accounts? | | |
| Do I know the best date(s) and time(s) for maximum reach and engagement? (use followonker tool) | | |
| Have I created editorial calendar to show what other departments, or business regions have planned ? (Corporate/partners only) | | |
| Have I developed and enhanced the strategic editorial planning and schedule marketable events throughtout the year? | | |
| Have I categorised posts accordingly (based on strategic phases)? | | |
| Did I pin-point the best opportunities based on social interaction /performance with my audience? | | |
| Am I tracking brand/name mentions, the most-shared content, conversions? | | |
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3. Integrated Content Management

The need to have a well-thought, organised and [compelling content](#) has never been greater. Effective and proactive teams create content (collaboratively) across multiple roles, departments, and even geographic zones.

| Activity | Yes | No |
|--|-----|----|
| Does my srcm system allow me to integrate the main social media channels such as: Twitter, LinkedIn, G+, FB, Instagram, Pinterest? | | |
| Have I organised content into monthly/ weekly campaigns? | | |
| Can I manage and quickly deploy content through a unique visual interface? | | |
| Do I have access to standardised template responses for common issues and/or questions? | | |
| Can I easely re-schedule top content for another week period? | | |
| Does my social management system allow permission-based access to certain type of content, campaigns, and folders? | | |
| Can I search and discover content via one interface using filtered attributes? | | |
| Can I search for industry content via same interface? | | |
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4. Smart Organic & Paid for Publishing

Effective content distribution means: staying on top of multiple media types and image formats, as well as ever-changing audience expectations and consumption habits.

| Activity | Yes | No |
|---|-----|----|
| Have I segmented content via product/service campaigns and content tags | | |
| Have I targetted and delivered specific content to pre-determined audiences on LinkedIn, Facebook, Twitter and Google+ by selecting the following attributes: gender, job role, education, hoobies etc? | | |
| Have I planned content using a recommendation engine for best-performing keywords and words to avoid? | | |
| Am I reaching my audience with paid * publishing options across a variety of channels? | | |
| Have I coordinated paid*-content distribution with supporting blog posts? | | |
| Have I distributed top content across multiple social channels simultaneously? | | |
| Have I thought about scheduling content for different time zones? | | |
| Have I automated link tagging through web-analytic integrations (Google Analytics, Clicky, Omniture, etc.) | | |
| Have I thought about creating custom URLs via integrated link shorteners? - (Ex: bit.ly) | | |

Notes:

* Optional - if you have the budget to do so

5. Social Monitoring

When well executed, your social fan base will share, comment, drive traffic and become loyal. This requires organised teams, fast response times (under 20-30 minutes) as well as positive and clear messaging.

| Activity | Yes | No |
|---|-----|----|
| Will I tag or categorise inbound content for maximum efficiency? | | |
| Will I monitor communications, shared questions/items, educational actions from other teams with my audience? | | |
| Will I monitor the right content using rules-based according to topic, influencer? | | |
| Will I monitor audience satisfaction, sentiment by category? | | |
| Will I setup and track social "crisis flag" around the brand, set alerts if they gain traction, and monitor the social lifespan around a crisis? | | |
| Will I setup response team(s) with the appropriate messaging and permissions, so that specific business people can access information and make decisions quickly? | | |
| Will I deliver real-time valued gifts/ offers/discounts to ongoing positive content comments? | | |
| Will I mention/Retweet Influencer content to my audiences? Which criteria should I use? | | |
| Will I reward team and/or individual efficiency/performance? And How? | | |
| Will I reward efficiency within a team and/or per individual reporting on the service level agreements (SLAs) that matter to you? | | |

Notes: Report on customer activities - to include in analytics:

- weekly response timing,
- open and/or close rates
- issue tracking at team and individual level.

6. Market trend & tracking

To drive engagement these days, social teams must stay alert to market trends and use that data insight to know when to join the conversation. It is no longer enough to simply publish planned marketing messages and respond to fans and followers.

| Activity | Yes | No |
|--|-----|----|
| Have I set a multiple social marketing channel tracking system? (<i>trends on your own terms, phrases, hashtags, or locations</i>) | | |
| Have I clearly identified and monitored top influencers in my industry? | | |
| Which keywords/phrases are they using? | | |
| Will I be using these keywords as well? | | |
| Have I created logging file for influencer's best #hashtags terms? | | |
| Do I know how often are they promoting these? | | |
| Do I know where? | | |
| Am I monitoring competition's audiences across my trending topics and hashtags? | | |
| Have I setup filter trends by industry terms? | | |
| Have I setup trends alerts for user/audience language, and its location? | | |
| Will I log their best branded terms? If so how many do I need? | | |
| What will I do with it? | | |
| Can I quickly visualise trending content topics in real time in my dashboard? | | |
| Can I export these trending content topics? | | |

Notes:

7. Management and team efficiency

| Activity | Yes | No |
|---|-----|----|
| Have I setup and configured a dashboard for rapid response? | | |
| Will I enable multiple response level actions across owned social media accounts (including private messages and replies to comments)? | | |
| Have I created pre-approved content relating to different potential situations/crises? | | |
| Have I setup social behavior guide for my team? | | |
| Have I setup a business policy statement/guide? | | |
| Have I setup customer history folder to enable deeper understanding of issue/questions with a view into conversation history? | | |
| Will I log influencers interactions/contribution to my social conversations, to help with the response priority? | | |
| Will I dedicate and provide extra social information to help tailor an authentic response? | | |
| Will I delete posts from social networks with easy spam identification | | |
| Have I got a strategy to block or remove undesirable interactions? | | |
| Will my interactions be formal, friendly or both? | | |
| Will I integrate and engage directly with third-party systems (e.g.external listening tools). | | |
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8. Online security and risk management

Online-security and risk management are one of the top concerns for many brands, especially for those in regulated industries. SMEs should also protect themselves.

| Activity | Yes | No |
|--|-----|----|
| Have/will I centralise and access all of our social activity without relying on multiple social networks? | | |
| Will I capture all inbound and outbound activity in a single system? (If you can I Recommended it.) | | |
| Will I perform daily backups encryption using SSL or other? | | |
| Will I record audience engagement across team members and social channels? | | |
| Will I archive my social conversations/ information? | | |
| Am I providing a controllable team user login to grant access across all branded social media accounts? | | |
| Will my system be able to manage passwords including CAPTCHA? | | |
| Will I need to control and restrict application access - (setup whitelist IP addresses)? | | |
| Will my business need to enable single sign-on/off using Security Assertion Markup Language (SAML) 2.0 http://saml.xml.org/ | | |
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Notes:

9. Analytics & reporting

Being able to accurately measure and report on your social media activity is vital for your business' survival.

| Activity | Yes | No |
|---|-----|----|
| Have I integrated one or more web analytics tools to track & measure online interaction or conversions? | | |
| Will I need to report/provide visibility into audience demographics and its composition on social media channels? | | |
| Have/Will I identify best performing content? | | |
| Have/Will I identify best daily audience engagement? | | |
| Have/Will I identify best performing channel activity? | | |
| Have/Will I identify best performing hashtag+ keywords? | | |
| Have/Will I identify best and best time of day interaction? | | |
| Have/Will I identify and report on volume, reach, and sentiment | | |
| Have/Will I analyse key accounts information in order to track fan growth, demographic trends, and impression data? | | |
| Will I compare monthly campaign message performance across all my social channels? | | |
| Will I monitor competitive comparisons of social campaign activity performance? | | |
| Do I need to measure voice of the customer (V.O.C) when launching my campaigns? | | |
| Have I setup high-level reporting to track the social footprint impact of any campaign? | | |
| Do I need to track the social footprint impact of a partnership, sponsorship, or media crisis? | | |
| Will I need to setup engagement metrics across non-owned social accounts? | | |
| What do I need to measure across my owned social accounts? | | |
| Have I created customised monthly reports and dashboards to highlight the data that matters to my business? | | |
| | | |

Notes: Offer high-level mapping context visibility to all internal stakeholders. Use custom dashboard displays that aggregate various metrics. Example: listen real time fan base community, your marketing accross other channels.

10.Strategic social management tool

Look for online software (apps) that provides ongoing support and On or Offline guidance (videos, webinars, case studies,...) Does your scrm tool :

| Activity | Yes | No |
|--|-----|----|
| Include social media dashboard allowing you to fully manage your daily interactions, audience, tags, departments, teams, and/or social quiz, surveys... ? | | |
| Allow you to control and be able to scale across all your business? | | |
| Allow you to easily customise roles, tasks, avatars and responsibilities? | | |
| Provide reporting services and/or feed you with customer insight? | | |
| Include software-training modules, provide you with relevant/ educational online course material, updates etc? | | |
| Provide 24/7 dedicated customer-centric service for account support (if possible otherwise 7/7 will do)? | | |
| Offer you a bespoke configuration or Add-on to meet your future needs? | | |
| Integrate/execute social curation and other digital experiences for major events and campaigns? | | |
| Provide intuitive controls allowing employees access to areas/depts they need to get their job done? | | |
| Segment your audience by tag system or limit user-engagement capabilities to certain departments/ geographies? | | |
| Provide community management and/or moderation services for live events? | | |
| Offer you interfaces based on user's day-to-day responsibilities? | | |
| Offer configurable multi-tiered escalation paths for audience content stages? (e.g., campaign draft, pending review, approvals, notifications, and mobile messaging). | | |
| | | |

Notes:

If you're a SMBs with 10 employed or over -then your scrm tool should offer you all the above features or at least 85% of it.

Conclusion:

CTH's main mission is to inform, educate and enable you and your business to achieve smarter social decisions for quicker and better results. With this checklist you'll market yourselves the right way whilst delivering what the customer/consumer wants or needs.

The technology you select must allow you to get horizontal and vertical view of your organisational needs and that for all social activities. Starting with brand awareness, customer service and campaign crisis management, sales, post-sales and recruiting.

Ensure that only approved content is published or shared, thanks to a pre-determined editorial content approval system. If you're already up and running - you may want to perform a quick audit. Download our [audit template](#).

Strategy made it simple.

Hope you enjoy this checklist. You don't have to follow or apply everything I illustrated here, as it will pretty much depend on the size of your business. But you'll see by yourself.

I have much more to offer you, so stay tuned for more actionable emails, hacks and fun stuff down the road!

Enjoy the ride.

Cheers!

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