

# **Social Media Plan Guide**

# Social Media Guide

## Social Media Planning Checklist

Social media can be daunting, but with some research and planning, you can use it to your business' advantage. Below is a quick six step Social Media Planning Checklist to help you get started.

### 1. Conduct your analysis

- ☐ Analyse the social media tools available.
- ☐ Analyse your business and find out if you're ready for social media.
- ☐ Analyse your customers to see if they use social media.
- ☐ Analyse your competitors and their social media pages.

### 2. Develop your social media strategies

- ☐ Revisit your business plan and look at your main business goals and strategies.
- ☐ Determine if and how social media can help you achieve them.
- ☐ Develop your marketing strategies to help you enter the market, develop your brand or build awareness, and communicate/engage with customers.

### 3. Establish the rules

- ☐ Develop some internal policies and procedures to cover security, privacy and content.
- ☐ Develop an acceptable use policy for your social media users.

### 4. Set up a team

- ☐ Set up a team with appropriate skills/training.
- ☐ Establish their roles and responsibilities.
- ☐ Familiarise them with your internal policies and procedures.

### 5. Get started

- ☐ Set up your page/profile/blog.
- ☐ Build your networks.
- ☐ Implement social media strategies.

### 6. Review

- ☐ Monitor and measure the impact of your strategies.
- ☐ Adjust/modify your strategies as needed.

## Overview

This overview provides details on each question asked throughout the social media plan template. When you start answering a question in your plan, you can refer to the relevant question below to help guide your answer.

### Title page

Question	Explanation
<b>Insert your business logo</b>	Adding a logo gives your business a more professional image, and creates a visual brand for your business.
<b>Your name</b>	Enter the business owner's name. Enter multiple names if there are multiple owners.
<b>Your title</b>	The titles of the business owner(s) listed above, e.g. Owner/Manager
<b>Business name</b>	Enter your business name as registered in your state/territory.
<b>Main business address</b>	Enter your main business address. This can be your home address if you're a home-based business or your head office if you have more than one location.
<b>ABN</b>	Enter your Australian Business Number (ABN). If you're a business and have registered for an ABN enter it here.
<b>ACN</b>	Enter your Australian Company Number (ACN). Only fill this in if you're a company.
<b>Prepared</b>	The date you finished preparing your social media plan.
<b>Table of Contents</b>	If you have changed this template in any way, please remember to update the table of contents to reflect the changes.

## 1. Conduct your analysis

Question	Explanation
<b>Social media tools analysis table</b>	<p>For each tool, include the purpose or a general description and any opportunities or limitations:</p> <ul style="list-style-type: none"> <li>• <b>Social media tool/website:</b> List each social media tool that you intend to analyse.</li> <li>• <b>Description:</b> What is the purpose of this social media tool or website? How do your customers use it?</li> <li>• <b>Opportunities:</b> Outline the specific areas of each tool that you think your business will use and how.</li> <li>• <b>Limitations:</b> Are there any rules or functionality that limit your ability to use the tool? E.g. strict terms &amp; conditions. If needed, you may like to include a link to each tool's terms and conditions.</li> </ul>
<b>Business analysis</b>	<p>Consider the following questions when analysing your business:</p> <ul style="list-style-type: none"> <li>• Overall, is social media suited to your business?</li> <li>• Are your customers or potential customers likely to use social media?</li> </ul> <p>Then for each social media tool list the main business goals, suitability to your business and the skills &amp; resources needed to use the tool in the table provided:</p> <ul style="list-style-type: none"> <li>• <b>Social media tool/website:</b> List each social media tool that you think you will potentially use.</li> <li>• <b>Business goals:</b> Which business goals/objectives does this social media tool align with or help achieve?</li> <li>• <b>Suitability:</b> Rank the tools according to how suitable the tool is to your goal(s).</li> <li>• <b>Skills/resources needed:</b> List any specific skills/resources that are needed to utilise this tool.</li> </ul>
<b>Online customer analysis table</b>	<p>For each social media tool, include details of your customers and their online usage in the table provided:</p> <ul style="list-style-type: none"> <li>• <b>Social media tool/website:</b> List each social media tool your customers use.</li> <li>• <b>Customer demographics:</b> Analyse your customer base. You can include age, gender, social status, education, attitudes, beliefs and interests.</li> <li>• <b>Volume of customers:</b> Estimate the number or percentage of your overall customers using social media.</li> <li>• <b>Details of use:</b> Include frequency of use, purpose, and interaction quality (high, medium or low interaction).</li> </ul>
<b>Competitor analysis table</b>	<p>For each social media tool, list your main competitors and details of their online presence in the table provided:</p> <ul style="list-style-type: none"> <li>• <b>Social media tool/website:</b> List each social media tool/website you intend to use.</li> <li>• <b>Competitor:</b> Competitor names</li> </ul>

	<ul style="list-style-type: none"> <li>• <b>Online Market share (%):</b> Enter an estimate of your competitor's percentage of market share for this tool/social media site. Alternatively, you can include the number of followers.</li> <li>• <b>Strengths:</b> What are your competitor's main social media strengths?</li> <li>• <b>Weaknesses:</b> What are your competitor's main social media weaknesses?</li> </ul>
<b>Risk management table</b>	<p>List the potential risks of social media to your business (in order of likelihood) and any mitigation/contingency strategies in the table provided:</p> <ul style="list-style-type: none"> <li>• <b>Business risk:</b> A description of the risk and the potential impact to your business. E.g. risk of exposing sensitive information.</li> <li>• <b>Impact:</b> The level of impact it may have on your business – high, medium or low.</li> <li>• <b>Likelihood:</b> The likelihood of this risk happening - either highly unlikely, unlikely, likely, or highly likely.</li> <li>• <b>Mitigation strategy:</b> What actions will you take to minimise/mitigate the potential risk to your business?</li> <li>• <b>Contingency plan:</b> What is your contingency plan in the event that this risk happens?</li> </ul>

## 2. Develop your social media strategy

Question	Explanation
<b>Vision &amp; goals</b>	
<b>Vision statement</b>	Include your vision statement from your business/marketing plan. The vision statement briefly outlines your future plan for the business. It should state clearly what your overall goals for the business are.
<b>Goals/objectives</b>	Include your short and long term goals from your business/marketing plan. What activities will you undertake to meet them?
<b>Your market</b>	
<b>Target market</b>	Who are you targeting through your social media tools/websites? What percentage of your overall target market will be using social media?
<b>Communication/engagement strategy table</b>	<p>Communication and customer engagement is extremely important in a social media environment and will vary depending on the tool. Getting this strategy right can help you build a larger following and enable you to develop more successful campaigns down the track. Detail your strategies in the table provided:</p> <ul style="list-style-type: none"> <li>• <b>Social media tool/website:</b> List each social media tool/site you will be using.</li> <li>• <b>Customers/users:</b> Include a brief description of the users you will be targeting for each social media tool.</li> <li>• <b>Communication strategy:</b> How will you engage/communicate with these customers? What strategies will you use to establish and maintain this interaction? E.g. giveaways, promotions or exclusive deals.</li> </ul>

	<ul style="list-style-type: none"> <li>• <b>Frequency:</b> E.g. Daily, twice-weekly, or weekly.</li> <li>• <b>Person/Team responsible:</b> E.g. Social media team.</li> </ul>
<b>Social media strategy table</b>	<p>Your strategies should be developed with your main business goals in mind; however they're often very different in a social media environment. Carefully researching your tools will also help you learn which strategies will work.</p> <p>Some of the key strategies that are developed early on include entering the market and brand development/awareness.</p> <p>Detail your activities/milestones in the table provided:</p> <ul style="list-style-type: none"> <li>• <b>Activity/milestone:</b> e.g. increase website traffic, search engine optimisation, networking, recruitment, paid advertising, in-app advertising, application (app) development.</li> <li>• <b>Person responsible:</b> Who is responsible for completing this task?</li> <li>• <b>Date of expected completion:</b> When do you expect to complete the activity?</li> <li>• <b>Cost (\$):</b> Estimated cost of activity. Even though social media is generally a free service, there are opportunities for advertising that you might wish to make use of.</li> <li>• <b>Key Performance Indicators (KPIs):</b> What indicator/ measurement result will need to be met before this activity is considered a success?</li> <li>• <b>Business goals:</b> Which business goals/objectives does this activity align with, or help achieve?</li> </ul>

### 3. Establish the rules

Question	Explanation
<b>Social media content policy table</b>	<p>A social media content policy is a clear set of rules for your social media team. Establishing this early can help you avoid problems in the future. List your main policy details in the table below. Include a reason why they're important to your business and which social media tools they apply to.</p> <ul style="list-style-type: none"> <li>• <b>Policy details:</b> You can include what can and cannot be published, tone of voice &amp; language principles, privacy principles, non-disclosure principles and general customer service standards.</li> <li>• <b>Reason:</b> Include a reason why each policy is important to your business.</li> <li>• <b>Applicable social media tool:</b> Which social media tool(s) does this policy apply to?</li> </ul>
<b>Social media content procedures</b>	<p>A social media content procedure is a step by step process that should be followed by your social media team. This procedure helps to clearly define the roles of each team member and is especially useful for developing an approval process, if needed. Consider these things when developing your procedures:</p> <ul style="list-style-type: none"> <li>• Does your procedure include an approval process for all content?</li> </ul>

	<ul style="list-style-type: none"> <li>Have you included a content removal procedure for inappropriate content?</li> <li>Does it cover procedures around accepting friends/followers?</li> </ul>
<b>Customer privacy strategy</b>	<p>Even if you're not already online, you're already bound by privacy regulations. When you go online or join a social media tool, protecting people's privacy becomes more challenging and requires a strategy to ensure that your customers and users are protected. Some useful ways of protecting your users/customers are:</p> <ul style="list-style-type: none"> <li>Putting privacy strategies or procedures in place to ensure the security of personal information.</li> <li>Introducing customer service/privacy standards.</li> <li>Following a privacy code of practice.</li> </ul>
<b>Security strategy &amp; procedures</b>	<p>If your business is already online, you may already have a security strategy. Social media procedures can just become a part of that strategy. Some of the issues you need to consider when developing your policy are:</p> <ul style="list-style-type: none"> <li>What internal authorisation procedures do you have for approval and monitoring of access to your online accounts?</li> <li>How have you protected your data and your network (E.g. virus protection, secure networks &amp; firewalls, secure passwords and data backup procedures)?</li> </ul>
<b>Acceptable use policies</b>	<p>An acceptable use policy spells out your rules for users. Some questions to consider for this section are:</p> <ul style="list-style-type: none"> <li>Do you have an acceptable use policy for each social media presence?</li> <li>Have you specified what content isn't acceptable e.g. illegal, explicit, or offensive comments/posts?</li> <li>Have you outlined the procedures for warning users and the subsequent removal or banning of the specified content/user?</li> </ul>

#### 4. Create your social media team

Question	Explanation
<b>Roles &amp; responsibilities table</b>	<p>If you need help to maintain your social media presence, consider existing staff with skills in social media. If not, consider providing your staff with appropriate training or recruiting new staff with the required skills. List your staff in the table provided:</p> <ul style="list-style-type: none"> <li><b>Role:</b> E.g. Social media manager</li> <li><b>Details of responsibilities:</b> From your analysis of the social media tools you're likely to use, list the main responsibilities your team are required to perform. Think carefully about your goals and what tasks will help you achieve them. Some examples of tasks/responsibilities for a social media manager include: <ul style="list-style-type: none"> <li>developing &amp; implementing social media strategies</li> <li>developing &amp; implementing marketing campaigns</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>performing regular monitoring &amp; measurement activities</li> <li>managing social media team</li> <li>networking.</li> </ul> <ul style="list-style-type: none"> <li><b>% of time spent on social media:</b> This will depend on the extend of your involvement in social media and how much time you're willing to spend E.g. 20%</li> <li><b>Person responsible:</b> E.g. J. Smith, Marketing Manager</li> </ul>
<b>Key personnel training table</b>	<p>List your current/future staff in the table provided and any training requirements.</p> <ul style="list-style-type: none"> <li><b>Job Title:</b> E.g. Marketing/ Sales Manager.</li> <li><b>Name:</b> E.g. J. Smith.</li> <li><b>Skills or strengths:</b> Relevant qualifications in Sales/Marketing. At least 5 years experience in the industry. Award in marketing excellence 2007.</li> <li><b>Training requirements:</b> E.g. Requires training in social media marketing.</li> </ul>

## 5. Get started

Question	Explanation
<b>Action plan table</b>	<p>Before you get started, it's useful to list all of the actions you plan to complete in the early stages. I.e. Researching your competitors or completing your social media plan. Then, once you're more confident in social media, you can include things like website traffic numbers, friend/follower numbers or sales milestones. List the main actions/milestones you hope to achieve in the first months/year in the table provided:</p> <ul style="list-style-type: none"> <li><b>Action/Milestone:</b> What are the social media milestones that you need to complete starting from today?</li> <li><b>Date of expected completion:</b> When do you expect to complete them?</li> <li><b>Person responsible:</b> Who is responsible for delivering this milestone?</li> </ul>

## 6. Monitoring/measurement activities

Question	Explanation
<b>Monitoring/measurement activities table</b>	<p>It's always important to monitor and measure the impact of your strategies to see if it has improved your overall sales/awareness. Once you know how effective your strategies are, you can adjust/modify them to improve the result. Some questions to consider include:</p> <ul style="list-style-type: none"> <li>How do you measure the impact of your strategy?</li> </ul>



	<ul style="list-style-type: none"> <li>• How has it improved your overall sales/awareness objectives?</li> <li>• Is it effective? If not, how can you modify your strategy to get a better result?</li> </ul> <p>Detail your monitoring/measurement activities in the table provided:</p> <ul style="list-style-type: none"> <li>• <b>Social media activity:</b> e.g. website traffic, search engine rankings, networking, recruitment, paid advertising, in-app advertising, application development.</li> <li>• <b>Date of review:</b> e.g. Month/Year?</li> <li>• <b>Monitoring methods:</b> What tools did you use to measure/monitor the impact of your social media activities?</li> <li>• <b>Review of outcomes:</b> What were the results for the promotional period? Did your activities/milestones achieve your Key Performance Indicators (KPIs)? What were your sales/profit figures? How many new/repeat customers did you receive? How many customers visited your website?</li> </ul>
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## Social media budget

Question	Explanation
<b>Social media budget [YEAR] table</b>	<p><b>Using the table</b></p> <p>The social media budget table contains a list of suggested social media activities a typical business may complete. When you double click on the table you can edit these items by removing or adding rows and typing in your own items. Remember to clearly display the year in the heading. <b>Please note:</b> The table assumes all figures are GST inclusive.</p> <p><b>Total formulas</b></p> <p>When you add your costs, the table will automatically total your items at the bottom of the sheet. If you're adding or removing rows please double-check your figures to ensure the total formulas have been preserved.</p> <p><b>Attach your own</b></p> <p>If you have your own social media budget or your accountant has already prepared one, please feel free to remove the table supplied and attach your own. If it is a large sheet, you can always attach it to the back of the plan and make reference to it from this section.</p>