

The Social Media Strategy Planning Prep List

This isn't a checklist, it's a prep list.

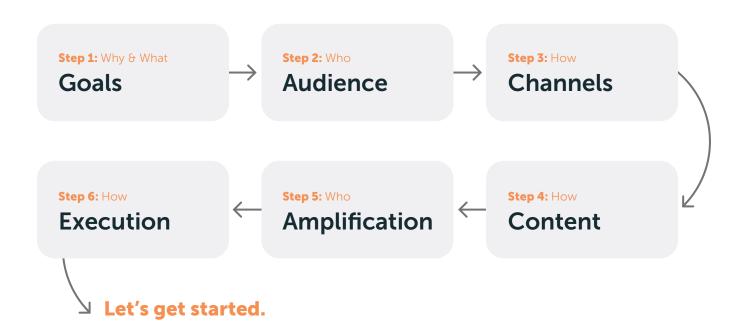
A checklist is a series of steps for executing a plan.

The prep list helps you figure out what you should be planning in the first place. It's the pre-work before your meeting.

The social media prep list is versatile. Use it for an annual plan, a campaign plan, or a sprint plan.

The prep list will help align your social media goals, roles, and content so you can build an audience that cares, shares, and converts in 2021.

The foundation of the Prep List is our 6-step social media strategy framework.





Discussion **Questions**:

- **1.** Are our social media goals linked to our most important business and marketing goals?
- **2.** Are they SMART (Specific, Measurable, Achievable, Relevant, Time-bound)?
- **3.** Can our goals break down into KPIs that will help us measure our progress towards them?
- **4.** Does leadership support the decision to focus on these goals?

Using this model, you can identify both a primary goal and secondary, supporting goals. Keep in mind: The more goals you set, the more resources it will take to achieve it.

Focus is key.

Step One

Setting Social Media Goals



Before you can start planning how to get somewhere you need to ask, "where are we going in the first place?" That somewhere is described by your social media goals.

Don't fall into the "pick a number" trap. Start with a real destination and work backwards.

Starting with your company-wide goals for the period, narrow in on what you need to achieve through your marketing and then social media program to hit them. You can do this in two steps: First by identifying the strategic role of social media in your plan, then its number.

Your Strategic Goals	Brand & Sales	Channel
Company Strategy	Marketing Strategy	Social Media Strategy
Example: Become the #1 leading provider of HRM software solutions	Example: Become the #1 trusted resource for mid-level HR professionals	Example: Become the leading destination for practical, HR career advice from actual HR experts
\$50 million in new customer revenue	5,000 new qualified opportunities in FY21	500 qualified opportunities from social media in FY21

Primary SM Goal	Secondary SM Goal
The most important outcome to achieve in order to be considered successful.	Other positive outcomes that social media supports.
500 qualified opportunities from social media in FY21	Channel: Earn 5,000 new HR followers on Linkedin and YT





Discussion Questions:

- **5.** Who are the core and aspirational audiences we need to reach?
- **6.** How would our audience describe themselves demographically, psychographically, and as a tribe (labels)?
- **7.** What are our audiences' goals and pain points we help solve?
- **8.** How can social media help them on their buying journey?

Step Two:

Identifying Target Audiences



Who do we need to reach to hit our goals? What do we know about our audience? That's step two. Identify the people that fall into these two main groups: your ideal customer profiles, and the people that influence them.

Complex businesses appeal to different industry segments, and several roles within each. So how do you choose? Keep in mind that the answer might be "choose more than one." Just know that more distinct audiences means more content customization and more paid campaigns to reach them.

Most Valuable Customers

The customer persona who could drive the most value.

Example: HR Director at a medium to large firms with growing HR management needs.

Influencer Audience

The audience persona who can elevate our brand and reach our customers.

Example: Thought leader in the HR space with a large network of engaged followers.





Discussion Questions:

- **9.** Are the primary channels vital to hitting our primary goals?
- **10.** Which channel features will we use to maximize our impact?
- **11.** Which channels should we keep on our radar to grow into next?
- **12.** Which channelspecific metrics will we monitor regularly?
- **13.** How will we measure and ensure we're reaching the right audience?

Step Three:

Establishing a Channel Strategy



After the "Who" comes the "Where." That means identifying social media channels to focus on, defining the role they'll play, and prioritizing the native features you will use.

Primary Channels

These are the main channels we're using to reach our target audiences with organic content and paid campaigns.



Channel-Specific Features

Example: Facebook Groups

Secondary Channels

These are growth channels we're monitoring, testing, or maintaining for new opportunities.



Channel-Specific Features

Example: Twitter Fleets





Discussion Questions:

- **14.** Which content formats and topics will we prioritize based on potential impact and available resources?
- **15.** What does our audience find funny? Useful? Beautiful? Inspiring?
- **16.** How do we bring out our personality, people, and places in our content?
- **17.** How can our content reduce the friction to becoming a customer?
- **18.** How would we describe our visual and written voice?

Step Four:

Designing a Content Strategy

Your content strategy is the foundation of your social media strategy. When outlining your content strategy, these are the four categories of content to keep in mind:

Content Strategy Foundation





Paid & Targeted



Evergreen Pillars & Themes



Campaigns



Timely & Responsive



Discussion Questions:

- **19.** Do we have the proper tracking in place to measure success from paid advertising?
- **20.** Do we have data from our prospects and customers that we can use to build more targeted audiences?
- **21.** Do we have our Pages, ad accounts, and Pixel set up in Facebook Business Manager?
- **22.** Which people and publishers that speak to our audience could be tapped as influencers?

Step Five:

Amplifying Content Distribution

All that useful, funny, interesting content you made won't matter without a plan for getting it in front of people. That's where paid distribution and amplification comes in. Start thinking about how you will expand your content's reach by identifying:



Budget

The spend we will set aside for dedicated campaigns and ongoing amplification across our channels.



Paid Audiences

The paid targeting audiences we will build for campaigns from cold (broad) to warm (retargeting).



Amplifiers & Influencers

The key accounts and individuals within our community who will extend the reach of our content including employees.



Key Content Assets

The branding or demand generation content we will amplify to hit our goals.





Discussion Questions:

- **23.** Which functional social media roles will be owned and supported by an individual contributor, outsourced, or shared by multiple people?
- **24.** What planning and implementation activities should be scheduled daily, weekly, monthly, and quarterly to stay on track?
- **25.** What tools do we need to organize our calendar, content + community management, and reporting more efficiently?

Step Six:

Implementation and Roles

The final planning step is to decide "who will do what by when." Whether you're a team of one or many, it's essential to assign the functional roles and their responsibilities.

Social Media Team Roles An owner should be assigned to each functional role in the social media program. Strategy & Planning Community Management Content Creation Paid Media Analysis & Reporting

Map the social media activities that will take place quarterly, monthly, weekly, and daily. Planning & Meeting Cadence Define the process for evaluating plans and progress against goals with the team.



Happy social media strategy prepping.

What's next?

- 1 For hands-on help with your social media strategy, request a proposal from the folks at Sculpt.
- 2 Build your own social media strategy using our DIY social media strategy template with dozens of pre-built slides.
- 3 Bookmark **this article** to dig deeper into the 6-step social media strategy framework.