

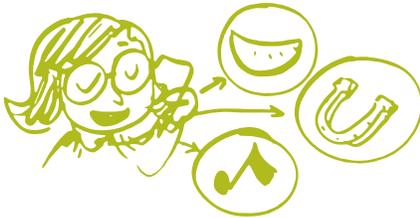
How to Write Your Social Media Plan

FOR YOUR CAUSE

causeclarity

Related Cause Clarity topics:

- How to choose social media
- How to create a consistent brand
- How to be wonderful in digital media



This worksheet is a complementary guide to help you put into practice the advice found in our “How to Write Your Social Media Plan for Your Cause” video. Each 3-minute video is packed with information and is designed to be watched multiple times—even while you are completing this worksheet.

WHAT Create a tactical plan for ensuring your social media accounts are effective and consistent.

TIME REQUIRED 5 hours

WHO IS INVOLVED We suggest brainstorming responses as a team. Alternatively, you can start this process alone and then refine with a larger group.

Social media can be an amazingly useful tool to expand your audience, encourage advocacy and increase donations. However, it requires a clear goal of what you want to accomplish through your social media efforts, a plan for how to implement and measure those efforts and a consistent, ongoing investment of time and energy.

This worksheet walks you through three steps that guide you in the creation of a plan to ensure that your foray into social media is sustained and grows in reach and impact.

1. Identify the capacity you have on your team (time, skills, talents)
2. Determine how you're going to measure your progress
3. Plan out a calendar of who's doing what

Here is a list of what you will have when you have completed the steps:



1. List of resources for content and skills
2. Key metrics dashboard for social media
3. Quarterly planning calendar with weekly themes, content topics, related visual assets and owner

→ For more help, contact Cause Communications at CauseClarity@CauseComm.org or visit CauseCommunications.org/tools to see other Bite-Size Courses.

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Every organization has its own unique journey on social media. This journey should start with a plan that lays out the strategy and goals you want to accomplish on these platforms. Use our “How to Choose Social Media” worksheet to brainstorm and prioritize your campaign objectives. Once those have been identified, complete the following three steps to build out the rest of your plan.

1. Identify the capacity you have on your team (time, skills, talents):

A. Think about how social media is used to promote events, reach media, cultivate donors and communicate with clients or others who take part in your programs. Take 15 minutes to outline the different departments, groups or programs that need to be involved in discussions related to social media. Organize them into categories such as: Content Providers (information, events, photos, videos, etc.), Content Creators (storytellers, writers, image/video editors), Conversationalists/Responders (schedulers, monitors, moderators, etc.) and Others.

B. Identify individuals within these groups with specific skills or talents in particular areas and add them to your list. Who is already active on a particular social media channel? Who can create graphics, edit photos or create videos?

C. Reach out to your colleagues and volunteers to see who's got something to share (e.g., images, stories, videos, news, events and campaigns they want to promote online). Add these individuals to your list.



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2. Determine how you're going to measure your progress:

Think about the metrics that will best track your progress on a specific communication goal. If you are trying to grow your audience, how often are your posts being shared or re-tweeted?* If you are using social media for fundraising, have donations gone up? Use the following chart to outline your audience, campaign goal(s), platform and metrics to measure your progress. For additional help with determining your social media audiences, goals and platforms, check out "How to Choose Social Media."

Priority Audiences	What do you want this audience to do?	Social Media Platforms to Use	Measurement of Progress
e.g. Biking enthusiasts	Signing and sharing petition to increase bike paths in our city	Facebook, Twitter, Instagram	Number of signatures, number of shares/retweets
1.			
2.			
3.			
4.			

*Tip: If a unique link is created for each you can track your click-throughs easily.



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3. Plan out a calendar of who's doing what:

Organize a planning calendar with anticipated topics or themes for each month, week or day, depending on your organization's production capacity and posting schedule. Once you have established your publishing frequency, fill in content specifics, which include posts/tweets, assets, links, etc. Be sure to join in on conversations around holidays, current events and established social topics, such as #tbt (throwback Thursdays) and #ff (follow Fridays).

Calendars can be organized in several ways:

- **Channel** – Create a separate editorial calendar for each major communications channel that requires a significant amount of content (Facebook, Twitter or your blog).
- **Audience** – If you have multiple, distinct audiences (e.g., teachers, parents and students) that you communicate with regularly, you might create a calendar for each audience.
- **Program** – To make sure you are spending an appropriate amount of time communicating about several different programs, organize editorial calendars for each one.

However you choose to organize your calendar, make sure your planned activities support your social media goals and align with your cause's mission. While the calendar is a useful guide, monitoring and responding to real-time events can provide opportunities to reach a larger audience and help your organization stand out. Also, dedicate time for quarterly review and planning to allow for adjustments and refinements based on experience. Check out the editorial calendar (Google Doc) developed by Lightbox Collaborative: <http://bit.ly/1IPyrD4> for inspiration.



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→ EXTRA TIPS

Tips For Creating a Social Media Editorial Calendar

- Start in baby steps and build out additional phases each quarter. For example, in the first three months you might plan to produce 30 pieces of total content (divided into blog posts and social media messages) and set a goal to increase total content by 25 percent for the 2nd quarter.
- Frequency and Timing: Start to track days and times that are getting the best responses.
- Share: The social media editorial calendar isn't designed to be a top-secret document. The idea is to share and collaborate across the team of writers, editors, researchers and other departments to generate content from all corners of your organization.
- Connect the dots between print and online and carry over print themes and campaigns into the social media calendar and vice-versa.