



The Essential Social Media Planning Checklist

Social Media is perhaps the most revolutionary development in communications and connectivity this century. It's become an essential tool for businesses and individuals to engage customers and potential customers in conversations about their brands.

Do it right and rather than you reaching out to your target customers, they come to you for the indispensable content and sense of brand community that only you can provide.

MORE THAN POSTING & SHARING

Social media is more than just posting an update to Facebook or Instagram or sending out a daily Tweet. To be successful, your Social Media efforts need to be part of an overall inbound marketing strategy for leveraging useful content through blogs, articles, brochures, videos, web sites, etc. for maximum impact across multiple channels.

Social Media should never be just another sales pitch. Consumers are too savvy. They want valuable content from the companies they buy (or potentially buy) from—content they can use in their everyday lives at home, at work, or on the go, to solve a particular challenge or fill a need.

Through Social Media, customers and potential customers become part of the conversation about your brand story, part of a community that is attracted and loyal to your product or service. As brand devotees, they talk about your brand, tell others, and share your content, becoming brand ambassadors that help to spread the word more quickly and effectively than was ever thought possible just fifteen years ago.

YOUR SOCIAL MEDIA PLANNING CHECKLIST

1. Social Media Audits and Competitor Analyses

As your first step to building a successful Social Media program, catalogue what you and your competitors are doing currently with Social Media. Create a spreadsheet or simple list to compare what's being done, what seems to be working, and what isn't working.

**Do you have a Facebook page, Twitter account, or LinkedIn profile?
What other Social Media platforms might be effective for your brand?**

2. Strategy Development

Next, clearly define what you hope to accomplish through Social Media. Do you simply want to raise awareness for your brand, generate leads, promote special events and offers, increase



demand for your product or service, all of the above, or something else?

- How will you accomplish your goals?
- What Social Media channels do your customers and potential customers use? Where do they expect to find you?
- What time and resources are you willing to devote to make this happen?

3. Setting Up Your Social Media Channels/Profiles

Once you've decided on the Social Media channels/platforms you will use, each account/profile needs to be activated and loaded with information about your company and your products and services. While Social Media profiles can vary across platforms, your profile content should remain consistent.

- Product and company descriptors/keywords
- Key personnel
- Blog/web site URLs
- Relevant photos and brand logos/images
- Relevant videos/links
- Customer service information

4. Creating and Delivering Content

Your content should reflect your company tone and message. It should also provide genuinely valuable information that readers cannot find elsewhere. Stay on message, but remain flexible enough to reference real-time, relevant events, company news, and industry trends. Reference other blogs/information sources to show your team is in touch and connected, and so readers of other blogs start following you and sharing your messages.

- Who will create your blogs and posts?
- How frequently will you post?
- Where will the information come from?
- Who signs off/approves the content?

5. Website/Blog Integration

Integrating your website and/or blog with Social Media is crucial for engaging visitors and keeping them engaged.

- At a minimum, implement Social Media share functions for your website pages and blog posts. This does not require you to have any Social Media presence, but does allow others to share your content with their Social Media circles.
- Place links to your Social Media platforms (such as Facebook, Twitter, LinkedIn, Instagram, Google+) prominently on your website.
- Use links to your website or blog articles in your Social Media posts to drive traffic back to your website.



6. Social Media Best Practice Guidelines

Social Media channels are not the places to criticize competitors or put down their products, nor the place to chastise consumers for posting negative reviews or comments about your brand. Play nice with others and make the content all about you and what you can do for your target buyers.

- What guidelines do you have in place concerning what's appropriate and what isn't?
- What are your guidelines on commenting and replying to posts from consumers?
- How do you handle disparaging or negative posts about your brand (whether deserved or not)?

7. Monitoring and Participating

- Who on your team is responsible for monitoring all of your Social Media channels?
- Who on your team/in your company can post or share?
- What is the approval process for sharing original content? For commenting and replying to posts made by consumers?
- How frequently is information updated?

8. Measuring Results

While boasting of two thousand followers on Twitter, hundreds of "likes" on your Facebook page, or a thousand connections in your LinkedIn network might sound impressive, the bottom line is that what's most important are the number of people who hire you, buy your product, or recommend you to their friends.

- How will you know your Social Media efforts are working?
- What measures can you put in place, such as web traffic, foot traffic, or increases sales?
- How can you measure which tactics, content, and types of posts work and which don't?

LET'S GET CREATIVE

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