



# Social Media & PR Strategy

Checklist & Guidelines

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6. About Econsultancy	

**Fout! Bladwijzer niet gedefinieerd**

# 1. Understanding Your Objectives

## 1.1. Questions to ask yourself

### 1.1.1. Who are you targeting?

#### FOR B2C MARKETING:

- Age
- Social Demographic
- Income
- Internet use and habits
  - When do they access the internet? Through what devices?
  - What kinds of content do they access?
  - What other media do they engage with?
  - What's their attitude to your brand/company?
- What do they like about your competitors?

#### FOR B2B MARKETING:

- Age
- What level are they in their company? e.g. C-suite, Director, Manager, Support staff, Employee
- What Job Titles or role do they hold?
  - Are they decision makers/influencers/users?
- Internet use and habits
  - When do they access the internet? Through what devices?
  - What kinds of content do they access?
  - Are there particular professional or social networks that are relevant to their role?
  - Are there specific websites or online tools that are relevant to their role?
  - What other media do they engage with?
- What's their attitude to your brand/company?

#### NOTES:

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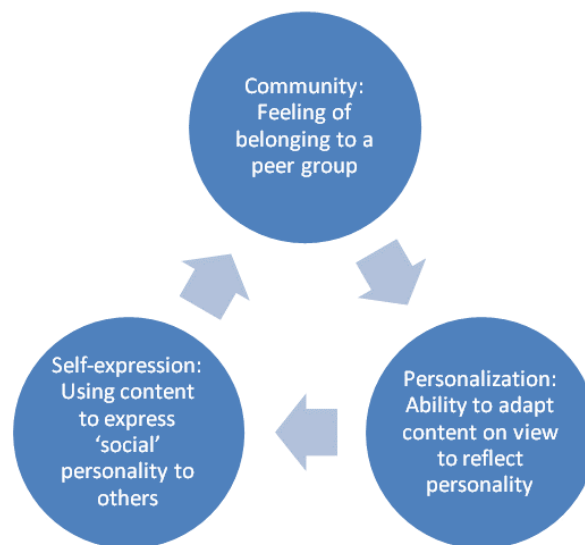
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## 1.1.2. What are your online business objectives?

What are you trying to get them to do?

- Spread the news
- Recruit a friend
- Visit your site
- Purchase a product
- Give a review
- Create and upload content
- Sign a petition
- Join a debate

What would motivate them to do this?



- Want to look clever/informed/cool/witty
- Love of your brand
- Genuine interest
- Curiosity
- To share with others
- A discount
- A gift
- Principles or a moral/political motivation
- Because its fun
- Like to feel part of a group
- Express their personality

### 1.1.3.

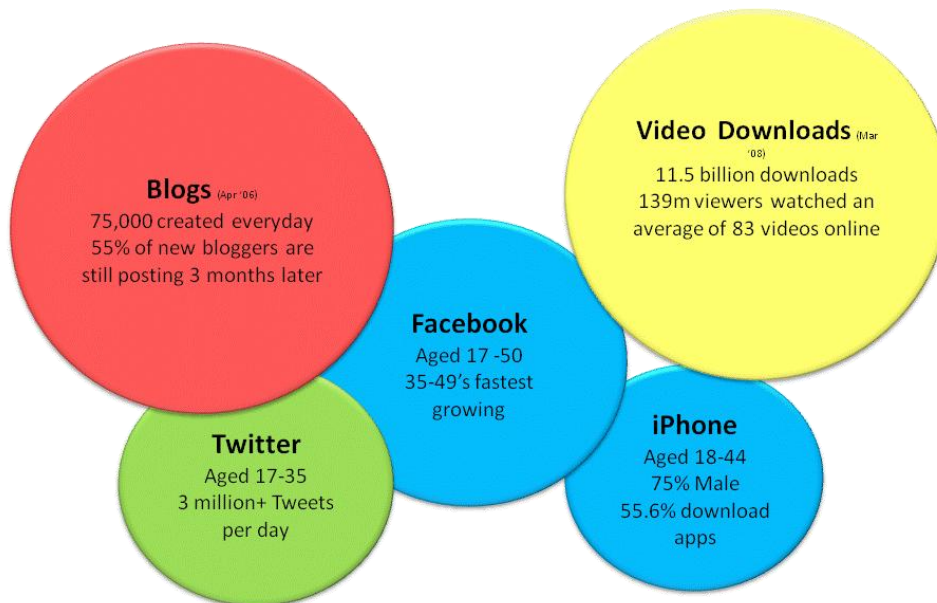
## How does your audience profile compare to the profile of users of specific social networks and tools?

- What social media areas do your audience access?
- How frequently?
- How involved do they get?
- Are they active at particular times of the day or week?

It may be useful to overlay your audience on a diagram such as the one below. Be aware that it does not include smaller elements of social media, such as RSS or Bookmarking tools.

- How important are these channels in influencing attitudes or behaviours towards your brand? For instance are their particular blogs or bloggers that have a strong following amongst your target group?

### A perfect match?



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### NOTES:

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### 1.1.4. What are your competitors doing to reach their key audiences?

- What social media channels and tools are they using?
- What is their Call to Action? What are they trying to get their audience to do?
- What degree of participation/engagement are they trying to achieve?
- Does it look like their having success?
- How many responses/mentions are they getting?

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### 1.1.5. Devise your strategic framework for each audience segment

This framework can be used to then narrow your ideas down to the most appropriate routes for each objective. From this you can narrow it down to specific campaign tactics based on your strongest routes.

Target Audience	Objective 1 (short term)	Potential channels	Objective 2 (long term)	Potential channels
Segment 1				
Influencers				
Segment 2				
Influencers				
Segment 3				
Influencers				

## 2. Campaign Strategy

2.1.1. Do you have a good understanding of the roles played by social media in your market sector/service environment?

	Market/Services/Product	Role/Purpose
Micro/Blogging		
RSS Feeds		
Social Bookmarks		
Social Networks		
Content Communities		

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2.1.2. Where are you currently? How to benchmark yourself.

YOU: \_\_\_\_\_

	Currently Active?	Estimated Level of Success (score 1-10)
Micro/Blogging	YES/NO	
RSS Feeds	YES/NO	
Social Bookmarks	YES/NO	
Social Networks	YES/NO	
Content Communities	YES/NO	

2.1.3. What social media strategies/campaigns are your competitors currently running?

Competitor: \_\_\_\_\_

	Currently Active?	Estimated Level of Success (score 1-10)
Micro/Blogging	YES/NO	
RSS Feeds	YES/NO	
Social Bookmarks	YES/NO	
Social Networks	YES/NO	
Content Communities	YES/NO	

Competitor: \_\_\_\_\_

	Currently Active?	Estimated Level of Success (score 1-10)
Micro/Blogging	YES/NO	
RSS Feeds	YES/NO	
Social Bookmarks	YES/NO	
Social Networks	YES/NO	
Content Communities	YES/NO	

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Competitor: \_\_\_\_\_

	Currently Active?	Estimated Level of Success (score 1-10)
Micro/Blogging	YES/NO	
RSS Feeds	YES/NO	
Social Bookmarks	YES/NO	
Social Networks	YES/NO	
Content Communities	YES/NO	

Competitor: \_\_\_\_\_

	Currently Active?	Estimated Level of Success (score 1-10)
Micro/Blogging	YES/NO	
RSS Feeds	YES/NO	
Social Bookmarks	YES/NO	
Social Networks	YES/NO	
Content Communities	YES/NO	

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2.1.4. Have you established realistic objectives & which channels are best to use?

	Objective 1 (Short-term)	Objective 2 (Long-term)
Micro/Blogging		
RSS Feeds		
Social Bookmarks		
Social Networks		
Content Communities		

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**2.1.5. Are there specific offline events that can be profiled through social media?**

Event	Micro/blogging	Social Networks	Other

**2.1.6. Do you intend to use social media to amplify a specific marketing campaign?**

Campaign	Micro/blogging	Social Networks	Other

**2.1.7. How will you measure the success of your social media strategy and whether your objectives are being met?**

	Objective 1 (Short-term) Measurement Method	Objective 2 (Long-term) Measurement Method
Micro/Blogging		
RSS Feeds		
Social Bookmarks		
Social Networks		
Content Communities		

**NOTES:**

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2.1.8. Have you considered *ALL* the possibilities/tools for measuring and tracking your social media strategy?

	Using/Will Use	Product/s Description
RSS Tools	YES/NO	
Keywords and Referrals Tools	YES/NO	
Industry-Related Website Tools	YES/NO	
Authority Websites Tools	YES/NO	
Micro/Blogging Tools	YES/NO	
Social Bookmarks Tools	YES/NO	
Network Followers Tools	YES/NO	
Content Communities Tools	YES/NO	

NOTES: \_\_\_\_\_  
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 \_\_\_\_\_  
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 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**2.1.9. Has a clear reporting structure/process been created against these objectives?**

	Objective 1 (Short-term) Reporting Method	Objective 2 (Long-term) Reporting Method
Micro/Blogging		
RSS Feeds		
Social Bookmarks		
Social Networks		
Content Communities		

**NOTES:**

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# 3. Listening & Monitoring

## Related Document

To help you in your social media monitoring, check out our [Social Media Measurement Template](#)

### 3.1.1. Have you created a list of search terms that identify the social media content that is relevant to you?

Company Name/s	
Product Name/s	
Service Name/s	
Company URL/s	
Key Employees	
Public Figures	
Industry-Related Terms, Keywords & Phrases	

3.1.2. Have you identified the important areas of social media that need to be covered, using your social media monitoring search terms?

Industry Websites	
Key Blogs	
Industry Figures	
Journalists	
Industry Publications	

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**3.1.3. What tools will you use to monitor your search terms within these social media areas?**

	<b>Monitoring Tools</b> (Eg. RSS, Google Alerts, Google Analytics, Twitter, Delicious)
Industry Websites	
Key Blogs	
Industry Figures	
Journalists	
Industry Publications	

**NOTES:**

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3.1.4. **Monitoring Timescale: How often will you monitor each individual media area?**

	Industry Websites	Key Blogs	Industry Figures	Journalists	Industry Publications
Mon	AM/PM	AM/PM	AM/PM	AM/PM	AM/PM
	AM & PM	AM & PM	AM & PM	AM & PM	AM & PM
Tue	AM/PM	AM/PM	AM/PM	AM/PM	AM/PM
	AM & PM	AM & PM	AM & PM	AM & PM	AM & PM
Wed	AM/PM	AM/PM	AM/PM	AM/PM	AM/PM
	AM & PM	AM & PM	AM & PM	AM & PM	AM & PM
Thu	AM/PM	AM/PM	AM/PM	AM/PM	AM/PM
	AM & PM	AM & PM	AM & PM	AM & PM	AM & PM
Fri	AM/PM	AM/PM	AM/PM	AM/PM	AM/PM
	AM & PM	AM & PM	AM & PM	AM & PM	AM & PM
Sat/Sun	AM/PM	AM/PM	AM/PM	AM/PM	AM/PM
	AM & PM	AM & PM	AM & PM	AM & PM	AM & PM

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**Related Document**

Econsultancy's [Online Reputation and Buzz Monitoring Buyer's Guide](#), which has been written for those who are looking for technology and services relating to online reputation monitoring. The guide also provides detail on the issues and trends relating to social media and "buzz" monitoring, as well as containing tips and pitfalls for companies looking for the most suitable supplier.

## 4. Responding & Engaging

4.1.1. Have you created clear/realistic policies and processes for responding?

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4.1.2. Have you identified/created platforms for your responses?

Source	Issue	Process of Response	Platform for Response

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# 5. Campaign Delivery & Workflow

## 5.1. Internal and External Responsibilities

5.1.1. Have you and your company indentified people who are either internally or externally responsible for your social media strategy?

Responsible for Social Media Programme:

NAME _____ DEPT. _____
REASON FOR RESPONSIBILTY: _____
_____
_____

NAME _____ DEPT. _____
REASON FOR RESPONSIBILTY: _____
_____
_____

NAME _____ DEPT. _____
REASON FOR RESPONSIBILTY: _____
_____
_____

NAME _____ DEPT. _____
REASON FOR RESPONSIBILTY: _____
_____
_____

5.1.2. Have you identified which individuals need to be consistently informed about planning, decisions, changes and progress of your social media strategy?

Social Media Programme Internal Contacts:

NAME_____	DEPT._____
NAME_____	DEPT._____
NAME_____	DEPT._____
NAME_____	DEPT._____
NAME_____	DEPT._____

Social Media Programme External Contacts:

NAME_____	COMPANY_____
REASON FOR CONTACT:_____	
_____	
NAME_____	COMPANY_____
REASON FOR CONTACT:_____	
_____	
NAME_____	COMPANY_____
REASON FOR CONTACT:_____	
_____	

## 5.2. Communicating Strategies Internally

5.2.1. Have you created clear and realistic social media policies and communicated them to your internal staff members of your organisation?

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5.2.2. Do you need to create an internal training programme to communicate your social media strategies and/or policies within your organisation?

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5.2.3. What steps do you intend to take in order to ensure that your organisations social media policies are being enforced and/or regulated within reason?

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5.3.3. Have you created a content development programme or editorial schedule?

Week number:		
	Content scheduled:	Responsibility of:
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday/Sunday		

5.3.4. When will you specifically engage in producing live content?  
 Eg. Specific timing of engagement on a blog/social network  
 etc?

Week number:		
	Engagement scheduled:	Responsibility of:
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday/Sunday		

