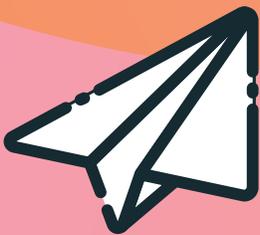


Social Media Strategy

# Prep List



**6 steps and 25 essential questions** for your next social media planning session



# 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.





## 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 channel-specific metrics will we monitor regularly?

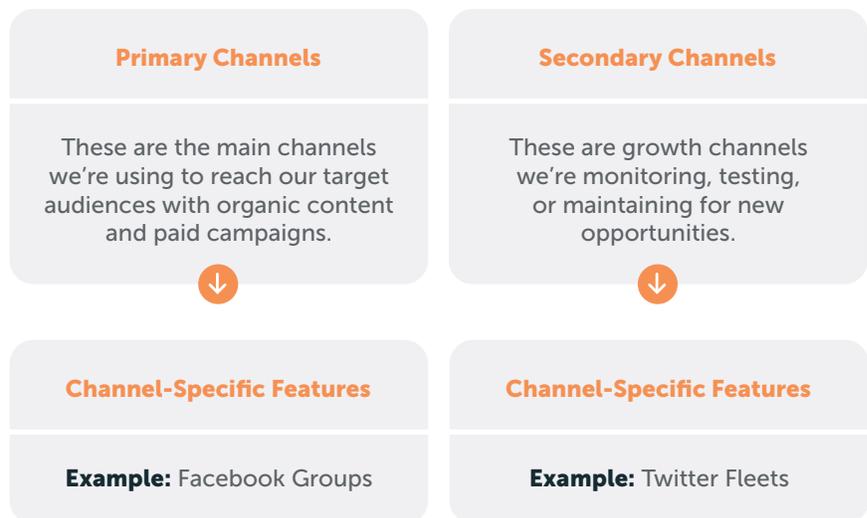
13. How will we measure and ensure we're reaching the right audience?

## 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.





## 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?

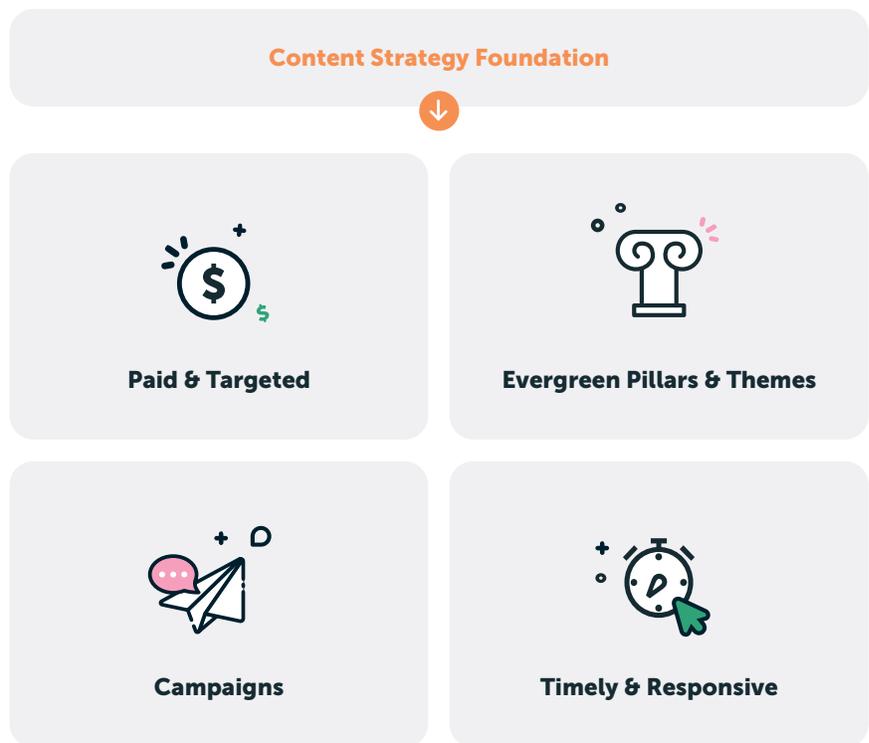
**18.** How would we describe our visual and written voice?

## 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:





## 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:





## 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.





# 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.