Exploring Ways to Work Together

Worksheet: Effective Social Media Planning

The table below presents some important questions to consider prior to establishing a professional social media presence. Use them to initiate conversations with both colleagues and collaborators about your social media thoughts and plans.

For more on this topic, visit the CAPT tool *Using Social Media to Facilitate Collaboration*.

Question	Related Considerations	Examples	Your Answers
Are We Ready to Establish a Presence?	Do we have the technology we need?	*e.g., only one partner has the necessary technological specs to support using social media at this time.*	
	Do we have the person power?	*e.g., our grant manager has approved 15 hours/week of staff time to be dedicated to social media activities.*	
	Do we have an online audience?	*e.g., yes, our target audience is mothers with children at home under the age of 18; 75% of this group is online.*	

Question	Related Considerations	Examples	Your Answers
Who, What, Where, and How?	*Who* are our target audiences?	*e.g., our target audience is mothers with children at home under the age of 18.*	
	What do we want to say?	*e.g., we want to address growing rates of alcohol misuse among mothers through (a) posting information about alternative coping strategies for dealing with the stresses of motherhood; (b) posting local/national resources, and (c) directing users to our online Facebook community.*	
	Where can we reach our audience (i.e., which platforms do they prefer?)*	*e.g., Facebook and Instagram (research shows that many mothers in this demographic primarily use).*	
	How do we set up and use accounts on our chosen platforms?	*e.g., to create a new Facebook account, will need to research most appropriate type of account (group, individual, page) to help reach our audience and achieve our goals.*	

Question	Related Considerations	Examples	Your Answers
Are There Rules We Need to Follow?	Does our organization have rules we need to follow related to social media use? Do our collaborators?	*e.g., we're restricted from accessing social media sites on our internal servers but there are no formal rules against working in collaboration with organizations that use social media for professional use.*	
	Does our collaboration need to create its own unique policies?	*e.g., since our members all come from organizations with differing social media policies, we need to ensure that content posted meets all of their criteria.*	
What Do We Want Our Account to Say About Us?	What do we want people to know about our collaboration?	*e.g., that we're a prevention organization working collaboratively to reduce substance misuse among new mothers.*	
	What message(s) should our audience(s) take away from our content?	*e.g., how they can access information and services to prevent substance misuse.*	
	What "tone" (e.g., friendly, research-oriented) will we use?	*e.g., because we are working to draw in mothers, we will be friendly with a focus on remaining non-judgmental.*	

Question	Related Considerations	Examples	Your Answers
Whose Account Is It Anyway?	Who has permission to create content or post updates?	*e.g., x organization has the most time/resources for professional social media use, so they will be responsible for posting content.*	
	How can we share responsibility for the account among our partners?	*e.g., we will all share responsibility for developing content (even if only one of us is posting it).*	
	How can we ensure that content is posted in a consistent manner and tone?	*e.g., we'll create a schedule and get all content for the following day to the posting member by the end of each workday. The posting member will review all content and edit as needed to ensure consistent tone and language.*	
How Are We Doing?	How will we measure our success?	*e.g., we'll see how many Facebook friends/followers we have and create measures to evaluate their level of interaction with our group/page (e.g., number of comments posted and re-sharing of content).*	

Question	Related Considerations	Examples	Your Answers
How Are We Doing? (cont.)	Are we reaching the right people?	*e.g., we'll poll followers to make sure we're reaching mothers with children under 18.*	
	How has our audience grown and changed since we started?	*e.g., we have 1,500 mothers in our Facebook group. Most recently, we've started to see an increase in empty-nester mothers and grandmothers joining our group.*	
	How is our social media presence helping (or hurting) the work of our collaboration?	*e.g., our weekly live discussion groups have resulted in almost 200 mothers participating on Facebook Live!*	
	How can we use our evaluation data to sustain our social media presence?	*e.g., if our evaluation data demonstrates that social media are actively helping us to achieve our organization's goals, we can advocate for >15 staff hours to be dedicated per week to broaden our reach.*	