

## **Social Media Marketing Plan Worksheet**

**Date:** \_\_\_\_\_

**Organization/Business Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Phone #s:**

Home: \_\_\_\_\_

Cell: \_\_\_\_\_

Business: \_\_\_\_\_

**Email:** \_\_\_\_\_

**Website(s):** \_\_\_\_\_

**Blog(s):** \_\_\_\_\_

**Social Media Links:**

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### **Step 1 – Your Social Media Goals**

What do you want to get out of social media? What would success look like?

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## Step 2 – Your Identity

A. Who are you? Who is going to be represented on the social media platforms?

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B. What are the products and/or services to be represented on social media platforms?

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C. Marketing tells a story. What story defines your social media identity (image you want to project?)

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B. Define your social media identity (image) in a single simple phrase:  
(i.e. "We're the smart fashion choice for hip young women")

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C. Put a check next to the items below that you **Already Do, Have or Use.**

1.  Email Newsletter Program (i.e. Constant Contact, Vertical Response).
2.  Email Platform (Gmail, Yahoo, AOL etc.)
3.  Comfortable with Being Visible On-line.
4.  Facebook Profile.
5.  Facebook Page (Formerly Fan Page).
6.  Google Account/Profile.
7.  Twitter.
8.  LinkedIn.
9.  YouTube Channel.

10. \_\_\_\_\_ Images Saved on Computer.
11. \_\_\_\_\_ Flickr, Picasa or other photo sharing sites.
12. \_\_\_\_\_ Instagram.
13. \_\_\_\_\_ Hootsuite or Tweetdeck.
14. \_\_\_\_\_ Dropbox.
15. \_\_\_\_\_ Feedburner or other subscription service.
16. \_\_\_\_\_ Blog(s).
17. \_\_\_\_\_ A Following or Followers
18. \_\_\_\_\_ Computer/Computer Skills.
19. \_\_\_\_\_ Smart Phone
20. \_\_\_\_\_ Tablet (iPad).
21. \_\_\_\_\_ Social Media Calendar.
22. \_\_\_\_\_ Foursquare or other Location Based Services.
23. \_\_\_\_\_ Google Analytics.
24. \_\_\_\_\_ Social Media Marketing Plan
25. \_\_\_\_\_ ROI (Return On Investment) Criteria.
26. \_\_\_\_\_ Writing skills.
27. \_\_\_\_\_ Digital Camera.
28. \_\_\_\_\_ Image Editing Program and Skills
29. \_\_\_\_\_ Video Camera.
30. \_\_\_\_\_ Video Editing Program.
31. \_\_\_\_\_ Read/Subscribe to Blogs.
32. \_\_\_\_\_ Make comments – Participate in Social Networking Conversations.
33. \_\_\_\_\_ Have your social media links on your business card.
34. \_\_\_\_\_ E-books.
35. \_\_\_\_\_ Write guest blog posts.
36. \_\_\_\_\_ RSS
37. \_\_\_\_\_ Logo and Logo image files

- 38. \_\_\_\_ Other Social Media Platforms
- 39. \_\_\_\_ Social Media Calendar or Plan
- 40. \_\_\_\_ All online sites fully linked to each other
- 41. \_\_\_\_ Subscription and Signup Options provided
- 42. \_\_\_\_ Newsletter Signup Sheets
- 43. \_\_\_\_ Business Card with social media links listed
- 44. \_\_\_\_ Social Media Strategy Coordinator ☺
- 45. \_\_\_\_ Member/Subscriber to online communities or organizations/businesses similar to yours
- 46. \_\_\_\_ Member/Subscriber to online communities regarding social media.

D. How are others in your industry using social media to meet goals similar to yours?

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E. How will you integrate social media into the core of your organization?

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F. What "off-line" activities and materials will support your social media plan?

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### **Step 3 – Your Customers**

A. Who are your customers? Who are you targeting with social media?

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B. What are the specific demographic characteristics of your customers?  
(age/economic status/education/hobbies/interests/traits/habits etc.)

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C. Are your customers tech savvy? Are they social networkers? What social media communities do they belong to? What social media platforms do they use?

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D. What issues/topics are your customers talking about in their social media communities?

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E. What is your "Value Proposition"? What benefits will your customer receive from you?  
What are their needs -- that you can meet? What information are they interested in receiving from you?

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F. What energizes your customers? What makes engage in your cause? What engagement strategies have worked in the past for your organization, or in your industry?

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G. To what other organizations and social media communities do your target customers belong?

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H. What content "voice" is appropriate to use with your customers?

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### **Step 4 – Your Resources**

A. How much time can you commit to social media per week (6 -11 hours is the 2010 "standard")

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B. Who will do the work?

Write content for blogs, newsletters and all postings? \_\_\_\_\_

Record, edit and provide videos? \_\_\_\_\_

Take, edit and provide images? \_\_\_\_\_

Synchronize all social media efforts? \_\_\_\_\_

Make Facebook/Twitter/Blog/Newsletter posts? \_\_\_\_\_

Monitor (on a daily basis) responses to posts? \_\_\_\_\_

Respond (religiously) to comments/issues generated by social media postings? \_\_\_\_\_

Maintain your email list – add new subscribers? \_\_\_\_\_

C. What are your long term expectations for the time required to achieve your social media goals?

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D. How often will you make posts, check your platforms, and send out a newsletter? What is your schedule?

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E. Who will be the official voice(s) for your organization? Who will be authorized to write content, make posts, and handle comments (both positive and negative?)

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### **Step 5: ROI (Return On Investment)**

A. How will you measure success?

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B. How often will you evaluate your progress toward your goals? Who will do this?

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## Addendum - Assessing Your Business

Check off the items below that you **ALREADY DO OR HAVE** for your business.

1. \_\_\_\_\_ Marketing Plan.
2. \_\_\_\_\_ Business Plan
3. \_\_\_\_\_ Social Media Marketing Plan.
4. \_\_\_\_\_ Business Name.
5. \_\_\_\_\_ Clearly Defined Brand.
6. \_\_\_\_\_ Financing -- Start-up/Operating capital.
7. \_\_\_\_\_ Determine Business Legal Structure.
8. \_\_\_\_\_ Home office or Studio/Commercial Space.
9. \_\_\_\_\_ Customers.
10. \_\_\_\_\_ Registered Business Name.
11. \_\_\_\_\_ Permits, Licenses and Knowledge of Regulations Pertaining your Business.
12. \_\_\_\_\_ Belong to Professional Business Organizations.
13. \_\_\_\_\_ Belong to Professional Organizations and Groups Pertaining to your Business.
14. \_\_\_\_\_ Attend Business Workshops.
15. \_\_\_\_\_ Knowledge of Local Resources for Business Support.
16. \_\_\_\_\_ Member of Chamber of Commerce.
17. \_\_\_\_\_ Print/Electronic Stationary, Invoice and Statement Forms.
18. \_\_\_\_\_ Computer.
19. \_\_\_\_\_ Scanner.
20. \_\_\_\_\_ Printer.
21. \_\_\_\_\_ Specialized Computer Software.
22. \_\_\_\_\_ Accounts with Suppliers, Shippers etc.
23. \_\_\_\_\_ Copyrights.
24. \_\_\_\_\_ Trademarks
25. \_\_\_\_\_ Investors.
26. \_\_\_\_\_ Expertise in your Industry.



27. \_\_\_\_\_ Business Courses.
28. \_\_\_\_\_ Business Degree.
29. \_\_\_\_\_ Read Business Books.
30. \_\_\_\_\_ Seek Out Relationships with Others in your Industry.
31. \_\_\_\_\_ Tax ID Number.
32. \_\_\_\_\_ Good Support System of Family and Friends.
33. \_\_\_\_\_ Plan for Tracking Success of Marketing Efforts (ROI).
34. \_\_\_\_\_ A Definition of What Success is for Your Business.
35. \_\_\_\_\_ Business Registered with your State.
36. \_\_\_\_\_ P.O. Box.
37. \_\_\_\_\_ Business Checking Account/Credit Card.
38. \_\_\_\_\_ City Business License.
39. \_\_\_\_\_ Budget.
40. \_\_\_\_\_ Business loan.
41. \_\_\_\_\_ Bookkeeper.
42. \_\_\_\_\_ Accountant.
43. \_\_\_\_\_ Accounting Software.
44. \_\_\_\_\_ Lawyer.
45. \_\_\_\_\_ Insurance – General Liability/Product Liability.
46. \_\_\_\_\_ Contracts.
47. \_\_\_\_\_ Storage for Business Records.
48. \_\_\_\_\_ Auto Mileage Record Keeping Plan.
49. \_\_\_\_\_ Attendance at Business Workshops, Seminars, and Webinars.
50. \_\_\_\_\_ Business Advisor.
51. \_\_\_\_\_ Business/Marketing Support Group.
52. \_\_\_\_\_ Business Networking Group.
53. \_\_\_\_\_ Elevator speech.  
(Can you say what you “do” during the time you have in an elevator with a stranger?)
54. \_\_\_\_\_ Business card.
55. \_\_\_\_\_ Head Shot/Portrait.

56. \_\_\_\_\_ Logo.
57. \_\_\_\_\_ Tagline.
58. \_\_\_\_\_ Letterhead.
59. \_\_\_\_\_ Testimonials.
60. \_\_\_\_\_ Resume (CV) (regularly updated).
61. \_\_\_\_\_ Written Statements about Your Business.
62. \_\_\_\_\_ Written Profile about Yourself.
63. \_\_\_\_\_ Brochures, Postcards, Fliers, Rack cards or other Promotional Pieces.
64. \_\_\_\_\_ Press Packet and Press Releases.
65. \_\_\_\_\_ Seek free publicity.
66. \_\_\_\_\_ Websites/Domain Names.
67. \_\_\_\_\_ SEO (Search Engine Optimized) web presence
68. \_\_\_\_\_ Email List.
69. \_\_\_\_\_ Mailing List.
70. \_\_\_\_\_ Video Media.
71. \_\_\_\_\_ Paper Newsletter.