

Guide for Planning a Best Practice Social Media Campaign

NSF-ATE DUE 1501911

EDUCATION DEVELOPMENT CENTER, INC. | 43 FOUNDRY AVENUE, WALTHAM, MA 02453



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The *Guide for Planning a Best Practice Social Media Campaign* is a product of the NSF-ATE Building Capacity in Social Media project (DUE 1501911). It was created as an aid to colleges looking to incorporate social media into their student recruitment strategies. The guide has been developed with the assistance of a panel of nationally recognized social media experts representing multi-national companies, small businesses and academia. The guide draws upon resources that these same experts developed for an earlier NSF-ATE project- the New Media Technician (DUE 1104220). Both projects have benefitted immeasurably by contributions from the following individuals:

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Joe Ippolito, PI
Senior Project Director
Education Development Center, Inc.

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INTRODUCTION

The guide includes three sections:

- Section One: Social Media Planning Template
- Section Two: Social Media Recording Template
- Section Three: Social Media Resources

The guide is designed to have the Planning Template used in tandem with the Recording Template. Both templates are organized around ten actions that the expert panel consider essential to an effective social media strategy. The ten action steps include:

1. Assess current marketing and social media efforts and resources
2. Identify specific goals and objectives of social media strategy
3. Identify exemplars/ competitors
4. Develop detailed profiles of target audiences (e.g. demographics, social media behaviors/ habits)
5. Determine the kind of content you want to disseminate
6. Select platforms to reach/ engage target audience(s)
7. Draft key messages
8. Execute social media plan
9. Measure social media engagement using social media analytics
10. Modify strategy based on results of analytics

On the Planning Template, these actions are listed in the far left column of each table. The middle column includes a series of guide questions. The questions are meant to provoke and guide thinking about how each of the ten recommended actions will be addressed. The far right column provides examples and resources that may be useful to the development of a plan. Some of these resources are included in Section Three. The far left column of the Planning Template also identifies the corresponding section of the Recording Template. The Recording Template is designed to capture information generated through the planning process into the components and processes that comprise a well-rounded, detailed social media strategy.

For questions or more information, contact Joe Ippolito, jippolito@edc.org.

PLANNING TEMPLATE

SOCIAL MEDIA PLANNING TEMPLATE

ACTIONS (Steps needed to prepare, implement and assess your plan.)	GUIDE QUESTIONS (Factors to be considered and as you are developing your social media plan.)	EXAMPLES/ RESOURCES
1. Assess current marketing and social media efforts and resources.	<ul style="list-style-type: none"> • What outreach is currently being done to recruit new students? For example: <ul style="list-style-type: none"> ○ Are college staff going to high schools? What are they promising high school students? ○ What current marketing materials do you have to approach this demographic? (Images, lingo, text, paragraphs, that can be re-used) • Who are the people on campus already thinking about your targeted audience? • Who will be involved in implementing your social media plan? • How much time will those involved in implementing your plan be able to devote to it? • How can you gain earned media (e.g. press tweeting about your events)? • Who at the college do you need to involve in your social media strategy to limit potential obstacles to its implementation? • What social media expertise do you have on hand? • What messages do you already have on hand? • Do you have any evidence that some messaging does or does not work? • How much can you piggyback on existing campaigns? 	

ACTIONS (Steps needed to prepare, implement and assess your plan.)	GUIDE QUESTIONS (Factors to be considered and as you are developing your social media plan.)	EXAMPLES/ RESOURCES
<p>2. Identify specific goals and objectives of social media strategy.</p> <p><i>See Recording Template-Component A</i></p>	<ul style="list-style-type: none"> • What will be the purpose of your social media strategy for this project? • What specific field of study or program will be the focus for your social media strategy? • What do you want your social media strategy to accomplish? • What specific effect do you want your social media strategy to have on recruitment? • What are your objectives (short term, quantifiable) for your social media strategy? 	<p>Examples of Goals/ Objectives:</p> <ul style="list-style-type: none"> • Promote IT Field • Increase interest in (name of program) • Increase engagement between (name of program) and targeted population. • Increase enrollment of women in engineering technology program • Increase enrollment of Hispanics/ Latinos in digital communications program. • Increase enrollment in course (name) by 25 students. • Increase enrollment of women in (name of course) by 10%.

ACTIONS (Steps needed to prepare, implement and assess your plan.)	GUIDE QUESTIONS (Factors to be considered and as you are developing your social media plan.)	EXAMPLES/ RESOURCES
3. Identify exemplars/competitors.	<ul style="list-style-type: none"> • What are other successful colleges and job training centers doing on social media? • What colleges/ programs are targeting the population your college wants to reach? 	<p>Articles about colleges using Social Media:</p> <ul style="list-style-type: none"> • http://www.cleveland.com/metro/index.ssf/2014/04/colleges_find_new_ways_to_reac.html • https://www.insidehighered.com/news/2013/11/27/institutions-recruit-students-reach-students-social-media <p>Examples of colleges using different social media platforms well:</p> <ul style="list-style-type: none"> • Instagram at the University of Oregon: https://www.instagram.com/uoregon/?hl=en • Twitter at Valencia College: https://twitter.com/valenciacollege • YouTube at Miami Dade College: https://www.youtube.com/user/MiamiDadeColleges/videos • <i>Attachment One – Researching the Field: How is Your Profession Using Social Media (from STEP eBook)</i>

ACTIONS (Steps needed to prepare, implement and assess your plan.)	GUIDE QUESTIONS (Factors to be considered and as you are developing your social media plan.)	EXAMPLES/ RESOURCES
<p>4. Develop detailed profiles of target audience(s) (e.g. demographics, social media behaviors/habits).</p> <p><i>See Recording Template-Component B</i></p>	<ul style="list-style-type: none"> • Who are the people you want to reach with your social media strategy? • Is your strategy targeting only potential students or potential students <i>and</i> their parents? • Is your social media strategy focusing on a specific demographic (e.g. age, gender, ethnic groups, unemployed)? Which one(s)? • What are the characteristics of your currently enrolled students who fit the specific demographic you are hoping to reach with your social media strategy? • What does the profile of a “typical” member of your target audience look like? What social media is s/he using? How often is s/he using them? When is s/he using them? 	<ul style="list-style-type: none"> • <i>Attachment Two - Resources for Researching the Demographics of Social Media Usage</i> • <i>Attachment Three- Sample Profile of Targeted Individual</i>
<p>5. Determine the kind of content to be disseminated to target audience(s).</p> <p><i>See Recording Template-Component C</i></p>	<ul style="list-style-type: none"> • Which format(s) will your target audience respond to best-e.g. audio, video, text? • Which format(s) are most appropriate for the messages you want to communicate- e.g. audio, video, text? • Are the messages you want to communicate best delivered in a formal or informal voice? • Which platforms provide the best vehicle to communicate the formats you have chosen? 	<ul style="list-style-type: none"> • <i>Attachment One- Resources for Researching the Demographics of Social Media Usage</i>

ACTIONS (Steps needed to prepare, implement and assess your plan.)	GUIDE QUESTIONS (Factors to be considered and as you are developing your social media plan.)	EXAMPLES/ RESOURCES
6. Select platforms to reach/engage target audience(s). <i>See Recording Template-Component C</i>	<ul style="list-style-type: none"> • Which platforms does your target audience access? • What platforms best convey the messages you want to communicate? • Will you need multiple platforms to reach your target audience? • Which of the following platforms will be included in your social media strategy? For example: <ul style="list-style-type: none"> ○ Facebook ○ Twitter ○ YouTube ○ Vine ○ Instagram ○ Tumblr 	<ul style="list-style-type: none"> • <i>Attachment One- Resources for Researching the Demographics of Social Media Usage</i>
7. Draft key messages. <i>See Recording Template-Component D</i>	<ul style="list-style-type: none"> • What are the key drivers that would encourage someone to attend the program/ enter the field you are recruiting for? For example: <ul style="list-style-type: none"> ○ The program/ field leads to success ○ People the same age are moving into the program/ field ○ People the same age will be on campus ○ Potential job opportunities in the field ○ Opportunity to improve lifestyle ○ Program/ field something parents would approve of ○ The program/ field leads to a cool profession 	

ACTIONS (Steps needed to prepare, implement and assess your plan.)	GUIDE QUESTIONS (Factors to be considered and as you are developing your social media plan.)	EXAMPLES/ RESOURCES
<p>8. Execute social media plan.</p> <p><i>See Recording Template-Component E</i></p>	<ul style="list-style-type: none"> • Who will be responsible for generating content? • How will you generate new content? • What will be your sources for new content? • What existing content can you repurpose? • What will your posting schedule be for each platform? • What kind of editorial calendar will you have to organize and manage your posts? • What upcoming school events can you feature and link to your recruitment messaging? • How might your social media campaign call for action from the target audience(s)? What might they be asked to do? 	<ul style="list-style-type: none"> • Examples of sources of content that you can repurpose for your social media strategy: <ul style="list-style-type: none"> ○ Trade journals ○ Links to stories, blogs ○ CIO magazine... ○ Campus stories ○ Relevant pop culture publications – e.g. Time magazine • See: How to Create and Manage an Editorial Calendar (look at the comments for additional template possibilities): http://rebekahradice.com/create-and-manage-an-editorial-calendar/ • <i>Attachment Five- Editorial Calendar Template</i> • See- Sample Social Media Posting Schedule: file:///C:/Users/jippolito/Downloads/Editorial%20Calendar%20-%20MayJune2015%20(1).pdf

ACTIONS (Steps needed to prepare, implement and assess your plan.)	GUIDE QUESTIONS (Factors to be considered and as you are developing your social media plan.)	EXAMPLES/ RESOURCES
<p>9. Measure social media engagement using social media analytics.</p> <p><i>See Recording Template-Component F</i></p>	<ul style="list-style-type: none"> • How will you know whether your social media strategy is successfully engaging your target audience? • What social analytic tools will you use to assess how well your social media strategy is working? • What metrics will you use to determine the extent to which your social media strategy is engaging your target audience? 	<ul style="list-style-type: none"> • Examples of metrics you might use to measure how effectively your social media strategy is engaging your target audience: <ul style="list-style-type: none"> ○ Reach ○ # responses to posts ○ # shares/ likes/ Retweets ○ # interactions in general ○ # comments (positive/ negative) ○ # impressions ○ # Click throughs- to information, enrollment, event registration, etc.
<p>10. Modify strategy based on results of analytics.</p> <p><i>See Recording Template-Component G</i></p>	<ul style="list-style-type: none"> • How will your social analytics affect your social media strategy? • What measurements will trigger revisions to your strategy? • When will you revise your strategy? 	<ul style="list-style-type: none"> • Examples of how your social analytics might affect your social media strategy: <ul style="list-style-type: none"> ○ If somebody says they really liked the program, ask them why, how, if they'd be willing to be public with the testimonial. ○ If you see negative comments, address appropriately and quickly. ○ Integrate #, @mentions from the most successful Tweets into new messaging. ○ Align messaging with the most successful Tweets ○ Adjust post hours depending upon most successful time.

RECORDING TEMPLATE

SOCIAL MEDIA RECORDING TEMPLATE

Key Personnel _____ Contact Information _____

Component of Social Media Plan	
<p>A. Goals/ Objectives</p> <ul style="list-style-type: none"> • List the recruitment goals and objectives of your social media strategy. 	
<p>B. Target Audience</p> <ul style="list-style-type: none"> • Describe the audience you are targeting with your social media strategy. • Identify all significant demographics of your target audience. For example: <ul style="list-style-type: none"> ○ Age range ○ Gender ○ Ethnicity ○ Employment status ○ School status ○ Other 	

Component of Social Media Plan								
<p>C. Platforms</p> <ul style="list-style-type: none"> • Identify with an “X” which of the following platforms will be part of your social media strategy. <ul style="list-style-type: none"> ○ Facebook ○ Twitter ○ YouTube ○ Vine ○ Instagram ○ Tumblr ○ Other? • Indicate with an “X” what type of content will be posted on each platform in your strategic plan. <ul style="list-style-type: none"> ○ Formal? ○ Informal? ○ Text? ○ Video? ○ Audio? ○ Other? 	Platform	Part of Plan?	Formal?	Informal?	Text?	Video?	Audio?	Other? (Identify)
	Facebook							
	Twitter							
	YouTube							
	Vine							
	Instagram							
	Tumblr							
	Other							
	<p>D. Key Messages</p> <ul style="list-style-type: none"> • Provide examples of the kind of content you intend to post as part of your social media strategy. 							

Component of Social Media Plan				
E. Posting Schedule <ul style="list-style-type: none"> • Identify for each platform in your social media strategy: <ul style="list-style-type: none"> ○ Day(s) of the week content will be posted ○ Time of day content will be posted. 	Platform	Days Content Will Be Posted	Time(s) of Day	
	Facebook			
	Twitter			
	YouTube			
	Vine			
	Instagram			
	Tumblr			
	Other			
F. Analytics <ul style="list-style-type: none"> • Identify the social analytic tools you will use to assess the effectiveness of your social media strategy. • Indicate how frequently you will use each analytic tool. • Identify what you will measure with the analytic tools you have chosen. For example: <ul style="list-style-type: none"> ○ Reach ○ # responses to posts ○ # shares/ likes/ retweets ○ # interactions in general ○ # comments (positive/ negative) ○ # impressions ○ # Click throughs- to information, enrollment, event registration, etc. 	Platform	Analytic Tool(s)	Frequency	What is measured?
	Facebook			
	Twitter			
	YouTube			
	Vine			
	Instagram			
	Tumblr			
	Other			

Component of Social Media Plan	
<p>G. Modifications to Strategy</p> <ul style="list-style-type: none"> • Describe how fidelity to the plan will be determined. • Identify how you will measure incremental progress towards meeting your recruitment goals. For example: <ul style="list-style-type: none"> ○ Attendance at informational event ○ # of enrollment forms completed ○ # of enrollment forms submitted ○ # of requests for more information ○ # favorite/ share/ like a social media post or account registers ○ # responses to a social media post or account ○ # of times members of target audience post their own accounts to one of your platforms ○ # enroll ○ #attend first class • Identify what trends in your social analytic data, or what trends in incremental progress measures will trigger revisions in your social media strategy. 	

RESOURCES

RESOURCE 1

Researching the Field: How is Your Profession Using Social Media?

This form is adapted from material originally developed for the NSF-ATE New Media Technician project: NSF DUE 1104220. Results of the research should provide enough detail to plan your own site.

Social media site studied: _____ **Platform:** _____

URL (if applicable): _____ **Period studied (suggested: 2 weeks):** _____

This site is owned by a: _____ Competitor _____ Colleague _____ Field Influencer

Research Question	Findings
Who is participating in the social media site?	
What are account owners posting? (Do they relate to the profession? Are the comments positive or negative? Do they add value? Are they posting text, images, links, videos?)	
What are participants posting? (Do they relate to the profession? Are the comments positive or negative? Do they add value? Are they posting text, images, links, videos?)	
Frequency/volume: How many posts occurred in the past 2 weeks? How current is the most recent post?	
Depth of conversations: Are posts just one-time posts, or do people respond? Do the posts build upon the original post in a way that increases knowledge or understanding?	
Influence of Platform: To the best of your ability, does the platform seem to help or hinder conversation? (e.g., Is it easy to use? Attractive?)	
How successful does the site seem to be, and why?	
Other – Anything else you noticed about this site?	
What have you learned from this social media site that you will use to inform your own?	

RESOURCE 2

Sources for Demographic Information About Social Media Usage

- The Demographics of Social Media Users/ *Pew Research Center*

http://www.pewinternet.org/2015/08/19/the-demographics-of-social-media-users/?utm_expid=53098246-2.Lly4CFSVQG2lphsg-Koplg.0&utm_referrer=https%3A%2F%2Fwww.google.com%2F

- Update: A breakdown of the demographics for each of the different social networks/ *Business Insider*

<http://www.businessinsider.com/update-a-breakdown-of-the-demographics-for-each-of-the-different-social-networks-2015-6>

- Successful social media platforms for Hispanics/ *CMN Blog*

<http://cmnagency.com/consumer-market/successful-social-media-platforms-for-reaching-the-hispanic-audience/>

- How often do you check your phone?/ *Daily Mail Online*

<http://www.dailymail.co.uk/sciencetech/article-2449632/How-check-phone-The-average-person-does-110-times-DAY-6-seconds-evening.html>

- 25 Amazing Vine Statistics

<http://expandedramblings.com/index.php/vine-statistics/2/>

- How many “snaps” Snapchat users get a day/ *Business Insider*

<http://www.businessinsider.com/how-many-snaps-snapchat-users-get-2013-11>

- 120 Amazing YouTube Statistics (December 2015)

<http://expandedramblings.com/index.php/youtube-statistics/2/>

- Engagement to die for/ Snapchat has 100M daily users.../ *VentureBeat/ Marketing/ by Dylan Tweney*

<http://venturebeat.com/2015/05/26/snapchat-has-100m-daily-users-65-of-whom-upload-photos/>

- The demographics of YouTube in 5 charts/ *Digiday*

<http://digiday.com/platforms/demographics-youtube-5-charts/>

RESOURCE 3

Sample Detailed Target Profile

One method that can be used in developing an effective social media strategy involves imagining someone who typifies the target audience. Several members of the project’s expert panel did this to initiate thinking about a student recruitment strategy. They did this by providing answers to questions like:

- How old is this person?
- What gender is this person?
- Is this person already enrolled in school? What is this person studying?
- Is this person employed? Part-time or full-time?
- What does this person do in their spare time?
- What social media applications does this person use?
- How frequently does this person access social media?

The resulting profile of “Fred” focuses on his interaction with social media.

FRED

Fred is 24 years old, lives in Bayonne NJ with his parents. He is studying IT at the local community college. Fred is a solid B student with an active social life. He works part time at a local Starbucks. He spends too much time on YouTube pursuing his interest in gaming and computer customization. Late at night he is usually involved in multiplayer online role playing games like “Call of Duty”. He takes his smart android phone with him wherever he goes and looks at his smartphone 15 times per hour. He oversleeps in the AM, does not check email, and is constantly texting. Fred even texts his professors to let them know he will be late getting to class. He posts 5-6 photos on Instagram daily to document his activities. Fred uses Facebook to watch videos, and will also use Snapchat, Vine and Tumbler.

These experts used Fred’s profile as their starting point for drafting a social media strategy that would have a good chance of gaining Fred’s attention and engagement. After reviewing current studies on social media usage (See Resource 1), the experts made educated guesses about the social media platforms most likely to reach Fred.

RESOURCE 4

Editorial Calendar Template

Week of _____

Theme _____

Platform		Platform A	Platform B	Platform C
Sunday	Content/ Post			
	Time of Post			
Monday	Content/ Post			
	Time of Post			
Tuesday	Content/ Post			
	Time of Post			
Wednesday	Content/ Post			
	Time of Post			
Thursday	Content/ Post			
	Time of Post			
Friday	Content/ Post			
	Time of Post			
Saturday	Content/ Post			
	Time of Post			

ADDITIONAL SOCIAL MEDIA RESOURCES

Education Development Center's NSF-ATE New Media Technician project (DUE 1104220) produced several products that were instrumental to the development of this guide and that have been used by community colleges intent on building the social media skills of their students. These include:

- A Profile of a Social Technology Enabled Professional (STEP), performance based rubrics aligned to the STEP profile, problem based lessons on social media skills, webinar archives, video clips: <https://sites.google.com/site/edcsteppublic/>. The STEP Profile identifies the work activities, skills, knowledge and behaviors found in individuals who effectively use social media to build a brand for themselves or their organization. The performance based rubrics provide a framework for assessing the degree to which an individual demonstrates proficiency in the use of social media skills. The problem based lessons use authentic scenarios to establish a context within which essential social media skills can be learned and practiced. The webinars and video clips include experts describing how best to use social media to meet strategic goals.
- ▶ Twitter: @SocialTechPro. The Twitter site shares information and examples of how college programs, small businesses and entrepreneurs can use social media for promotion and community building.
- ▶ eBook: *5 Steps for Using Social Media to Build Your Brand and Promote Your Business*: ISBN: 978 151 161 0655. The eBook incorporates all of these materials in a highly engaging way.