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## Social Media Plan Template

**The Executive Summary (5 Points)** – The executive summary is a synopsis of your entire social media plan. Its purpose is to offer a reader a snapshot look at what the plan is about. This is written last, and included should be:

- a sentence about the company and the industry it is in
- a statement (or sentence) about how it is situated in its industry (leader? upstart? major player?) (info taken from the **situational analysis**)
- a statement (or sentence) about who the companies customers are (info taken from **market segmentation**)
- a statement (or sentence) about a (the) problem confronting the company (info taken from the **Purpose Statement**)
- a sentence about why social media was chosen as a solution (info taken from the **situational analysis, market segmentation** and/or **strategies**)
- a sentence about the proposed solution and its outcome (info taken from **Goals and Objectives**)

**The Purpose Statement (5 Points)** – The purpose statement is the pitch for the social media plan and campaign. It answers the question “why are we doing this,” and will often pull small bits of information from the situational analysis (a response to a weakness, threat or opportunity).

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**Situational Analysis** – The situational analysis contains two subsections: The company analysis and the competitor analysis.

**Company Analysis (5 Points)** – The company analysis provides information about the company. Through the use of a SWOT analysis, the company's **economic**, **political**, **geographic**, **social** and **cultural** environments (and how it is situated within them) are detailed. The following should be included:

- Goals, Mission, Vision and/or Core Value statements (Note: these are typically created by company leadership – not by marketers. You'll need to create them here.)
- Short descriptions of the company's current economic (market position), political, geographic, social and cultural environments.
- A SWOT analysis (Strengths, Weaknesses, Opportunities and Threats)

**Strengths**

**Weaknesses**

**Opportunities**

**Threats**

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**Competitor Analysis (5 Points)** – The competitor analysis offers perspective and answers the question “what are we up against” in our market. If there is a lot of competition then this section can get a little out of hand, so it is in the best interest to ***focus in on the most crucial competitors***. Lesser competitors can be mentioned by name in the SWOT analysis if necessary. This section should include:

- The competitor’s market position (what is their financial outlook, stocks, annual revenue, etc.)
- The competitor’s digital footprint (In what ways are they engaging their customers online? How visible is their brand? What social media channels do they use?)
- What are their strengths and weaknesses relative to social media and online engagement? (i.e. Is their Facebook page weak in engagement? Do they ignore Twitter? Are they absent for a social media site they should be on? etc.)

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**Market Segmentation (10 Points)** – In this section you profile your customer base, sectioning them into percentile groups. Segmentation is often represented through the use of a pie chart, but creating segments is often best accomplished through the use of a segmenting tree chart. Longstanding companies that know their customers will often have segmented them out through years of research. New companies need to brainstorm and create profiles, and then test them over time. This section should include:

- Brief descriptions / profiles of your customers
- A pie chart visual of the segmentation

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**The Four P's (10 Points)** – The four P's section is useful as a quick reference sheet and guide to all aspects of your campaign. The section provides the specifics on *what are we selling* and *how are we selling it*. You must answer the following:

- What is your **product**(s)
- What is the product's **price**(s)
- What is the product **placement**(s) both *on a store shelf or in an online store section* **AND** *in the psychology of your customer* (i.e. most people think of coffee as "something I make or drink in the morning.")
- What are the **promotion** channels (you will define the *strategy* for these channels in a later section)

**Product**

**Price**

**Place**

**Promotion**

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**Goals and Objectives (10 Points)** – Your social media plan should contain 1 – 3 goals and their associated objectives. Remember, goals are **broad, unmeasurable** statements that are typically **unattainable**. Objectives are **focused, measurable** statements that are **attainable** and ***must point back toward a goal***. How many objectives should you have? The answer: as many as you need to satisfy the goals (isn't that helpful?).

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**Strategies by Network, Community, and Blog Categories (10 Points)** – As a social media marketer, this is where you get to show off! Below you will detail the strategies you intend to use to accomplish your goals and objectives. Here is what you should include for each strategy:

- The name of the strategy (You make this up, but the name should reflect the process)
- The platform or communication channel(s) that will be used to accomplish this (i.e. Twitter, email, Pinterest, etc.)
- The approach you will use (for instance, hashtag campaigns on Twitter, guest blogging on Wordpress blogs, or promotions through a Ning or Facebook group, etc.)
- The strategic metric you will measure in the strategy (for instance, hashtag mentions, # of guest blogs created, number of promotional codes redeemed through the company website, etc.)
- Which **objective** the strategy ties back to

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**Action and Implementation (5 Points)** – The action and implementation section answers three basic questions: how are we going to do this, who is going to do it, and when will they do it. The format of this section should be laid out in chronological steps. For instance:

**Step 1:** The marketing group brainstorms ideas for a Twitter hashtag campaign at headquarters (May 1, 2012)

**Step 2:** John Smith does follow up research on high potential hashtags formulated during the brainstorming session using *hashtags.org* and other sites (May 2 – May 4)

**Step 3:** Jane Doe researches Twitter updates from other industry leaders to identify possible high potential keywords for inclusion in campaign updates and possible text ads (May 2 – 4)

**Step 4:** Etc. etc.

Your section need not look exactly like this – you may adjust where the date is located and how things are phrased as you please. In some cases you may even include time stamps (i.e. Tuesday at 3:30pm) when hours or minutes matter. Don't be surprised if you have 30+ steps and if this takes up a couple pages.

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**Financial Statements (5 Points)** – The financial statements section is simply a ledger, showing where and to which items you intend to devote your budget dollars. For this project, you have a budget of \$10,000 – it is not much, but it's better than nothing. Spend it wisely.

Item #	Description	Quantity	Attached to Goal / Objective	Cost
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
			Total \$\$	

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**Conclusion (5 Points)** – This is it! Your last final chance to make an impression and score the funding needed to launch this plan into action. The conclusion should perform a few very important functions. How the conclusion is worded and ordered is your decision.

- Remind the audience of the plan (The C-suite, the owner, etc.) why this plan is of critical importance
- Suggest immediate steps that could be taken to begin moving the plan forward
- If any aspect of the plan may be controversial, or if you suspect a section might not get approved, suggest alternative approaches to the contested sections. It is better that a portion of the plan get approved than nothing at all!