Want to use social media in your business, but don’t know where to start? Our Social Media Plan Template can help you collect your thoughts into one simple document.

Use the tables below to answer key questions about your business, and start you Social Media Plan today. Simply answer the questions in italics.

**Social Media Planning Checklist**

Below is a quick six step Social Media Planning Checklist to help you get started. You can also read our [Social Media](http://digital.masterelectricians.com.au/digital-pr/social-media/) topic, or send us an [email](mailto:digital@masterelectricians.com.au) for further assistance.

1. **Conduct your analysis** 
   * Analyse the social media tools available.
   * Analyse your business and find out if you’re ready for social media.
   * Analyse your customers to see if they use social media.
   * Analyse your competitors and their social media pages.
   * Conduct a risk assessment for social media activities.
2. **Develop your social media strategies** 
   * Revisit your business plan and look at your main business goals and strategies.
   * Determine if and how social media can help you achieve them.
   * Develop your marketing strategies to help you enter the market, develop your brand or build awareness, and communicate/engage with customers.
3. **Establish the rules** 
   * Develop some internal policies and procedures to cover security, privacy and content.
   * Develop an acceptable use policy for your social media users.
4. **Set up a team** 
   * Set up a team with appropriate skills/training.
   * Establish their roles and responsibilities.
   * Familiarise them with your internal policies and procedures.
5. **Get started** 
   * Set up your page/profile/blog.
   * Build your networks.
   * Implement social media strategies.
6. **Review**
   * Monitor and measure the impact of your strategies.
   * Adjust/modify your strategies as needed.

**[INSERT YOUR BUSINESS LOGO]**

[Your Name]   
[Your Title]

[Business Name]

[Main Business Address]

**ABN:** [ABN]

**ACN:** [ACN]

[Business Name]

# Social Media Plan

**Prepared:** [Date prepared]

## 1. Conduct your analysis

### Social media tools analysis

|  |  |  |  |
| --- | --- | --- | --- |
| **Social media tool/website** | **Purpose/description** | **Opportunities** | **Limitations** |
| List each social media tool that you intend to analyse. NB: Visit our [Social Media topic](http://digital.masterelectricians.com.au/digital-pr/social-media/how-to-guide/) for details of each social media platform | What is the purpose of this social media tool or website? How do your customers use it? | Outline the specific areas of each tool that you think your business will use and how. | Are there any rules or functionality that limit your ability to use the tool? E.g. strict terms & conditions. If needed, you may like to include a link to each tool's terms and conditions. |
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### Business analysis

It may help to think of your answer to the following questions when completing this section:

* Are your customers or potential customers likely to use social media?
* Do you have adequate skills or resources to launch an online social media presence?

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| --- | --- | --- | --- |
| **Social media tool/website** | **Business goals** | **Suitability** | **Skills/resources needed** |
| List each social media tool that you think you will potentially use. NB: Visit our [Social Media topic](http://digital.masterelectricians.com.au/digital-pr/social-media/how-to-guide/) for details of each social media platform | Which business goals/objectives does this social media tool align with or help achieve? | Rank the tools according to how suitable the tool is to your goal(s). | List any specific skills/resources that are needed to utilise this tool. |
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### Online customer analysis

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| --- | --- | --- | --- |
| **Social media tool/website** | **Customer demographics** | **Volume of customers** | **Details of use** |
| List each social media tool your customers use. NB: Visit our [Social Media topic](http://digital.masterelectricians.com.au/digital-pr/social-media/how-to-guide/) for details of each social media platform | Analyse your online customer base. You can include age, gender, social status, education and attitudes. NB: [business.gov.au](http://www.business.gov.au/business-topics/business-planning/marketing/conduct-market-research/Pages/default.aspx) has handy tools for conducting marketing research | Estimate the number or percentage of your overall customers using social media. | Include frequency of use, purpose, and interaction quality (high, medium or low interaction). |
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### Competitor analysis

[For each social media tool, list your main competitors and details of their online presence.]

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| --- | --- | --- | --- | --- |
| **Social media tool/website** | **Competitor** | **Online Market share (%)** | **Strengths** | **Weaknesses** |
| List each social media tool/website you intend to use. NB: Visit our [Social Media topic](http://digital.masterelectricians.com.au/digital-pr/social-media/how-to-guide/) for details of each social media platform | Competitor names. | Enter an estimate of your competitor's percentage of market share for this tool/social media site. Alternatively, you can include the number of followers. | What are your competitor's main social media strengths? | What are your competitor's main social media weaknesses? |
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### Risk management

List the potential risks of social media to your business (in order of likelihood) and any mitigation/contingency strategies.

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| --- | --- | --- | --- | --- |
| **Business risk** | **Impact** | **Likelihood** | **Mitigation strategy** | **Contingency plan** |
| Description of the risk and the potential impact to your business. E.g. risk of exposing sensitive information, risk of customers posting negative reviews NB: Visit our [Social Media topic](http://digital.masterelectricians.com.au/digital-pr/social-media/how-to-guide/) for more about risk management | High, Medium, Low. | Highly Unlikely, Unlikely, Likely, Highly Likely. | What actions will you take to minimise/mitigate the potential risk to your business? | What is your contingency plan in the event that this risk happens? |
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## 2. Develop your social media strategy

### Vision & goals

### Vision statement

### Include your vision statement from your business/marketing plan. The vision statement briefly outlines your future plan for the business. It should state clearly what your overall goals for the business are.

### Goals/objectives

### Include your short and long term goals from your business/marketing plan. What activities will you undertake to meet them?

### Your market

### Target market

### Who are you targeting through your social media tools/websites? What percentage of your overall target market will be using social media?

### Communication/engagement strategy

### How will you communicate or engage with your target market? How often? How will you establish and maintain this interaction?

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| --- | --- | --- | --- | --- |
| **Social media tool/site** | **Customers/users** | **Communication strategy** | **Frequency** | **Person/Team responsible** |
| List each social media tool/site you will be using. | Include a brief description of the users you will be targeting for each social media tool. | How will you engage/communicate with these customers? What strategies will you use to establish and maintain this interaction? E.g. giveaways, promotions or exclusive deals. NB: Visit our [Social Media topic](http://digital.masterelectricians.com.au/digital-pr/social-media/how-to-guide/) for details of each social media platform | E.g. Daily, twice-weekly, or weekly. | E.g. Social media team |

Social media strategy

It may help to think of your answer to the following questions when completing this section:

* How do you plan to enter the market?
* What activities will you complete to develop your brand or build awareness?
* What do you want to achieve?

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| --- | --- | --- | --- | --- | --- |
| **Activity/milestone** | **Person responsible** | **Date of expected completion** | **Cost ($)** | **Key Performance Indicators (KPIs)** | **Business goals** |
| E.g. increase website traffic, search engine optimisation, networking, recruitment, paid advertising, in-app advertising, reciprocal linking, application development. | Who is responsible for completing this task? | When do you expect to complete the activity? | Estimated cost of activity. | What indicator/ measurement result will need to be met before this activity is considered a success? | Which business goals/objectives does this activity align with or help achieve? |
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## 3. Establish the rules

### Social media content policy

List your main policy details in the table below. Include a reason why they’re important to your business and which social media tools they apply to. You may also like to attach a copy of your full social media policy to the back of this plan. You can also download our [social media policy template](http://digital.masterelectricians.com.au/wp-content/uploads/2014/10/Social-Media-Policy-Template_web.dotx), and customise it to suit your needs.

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| --- | --- | --- |
| **Policy details** | **Reason** | **Applicable social media tool** |
| You can include what can and cannot be published, tone of voice & language principles, privacy principles, non-disclosure principles and general customer service standards. | Include a reason why each policy is important to your business. | E.g. All |
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### Social media content procedures

Does your procedure include an approval process for all content? Have you included a content removal procedure for inappropriate content? Does it cover procedures around accepting friends/followers?

### Customer privacy strategy

What current privacy strategies or procedures do you have in place to ensure the security of personal information? Have you introduced customer service/privacy standards? Do you follow any particular code of practice?

### Security strategy & procedures

What internal authorisation procedures do you have for approval and monitoring of access to your online accounts?

### Acceptable use policies

Do you have an acceptable use policy for each social media presence? Have you specified what content isn’t acceptable e.g. illegal, explicit, or offensive comments/posts? Have you briefly outlined the procedures for warning users and the subsequent removal of the specified content/user?

## 4. Create your social media team

### Roles & responsibilities

| **Role** | **Details of responsibilities** | **% of time spent on social media** | **Person responsible** |
| --- | --- | --- | --- |
| E.g. Social media manager | E.g.   * Develop & implement social media strategies * Develop & implement marketing campaigns * Perform regular monitoring & measurement activities * Manage social media team * Networking. | E.g. 20% | E.g. J. Smith, Marketing Manager |
| E.g. Social media administrator | E.g.   * Monitoring daily and responding to comments/enquiries. * Posting/updating twice weekly * Approving/removing users * Removing inappropriate content * Networking. | E.g. 50% | E.g. M. Bloggs |

### Key personnel training

List your current/future staff in the table below and any training requirements.

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| --- | --- | --- | --- |
| **Job Title** | **Name** | **Skills or strengths** | **Training requirements** |
| E.g. Marketing/ Sales Manager | E.g. J. Smith | Relevant qualifications in Sales/Marketing. At least 5 years experience in the industry. Award in marketing excellence 2007. | Requires training in social media marketing. |
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## 5. Get Started

### Action plan

Before you get started, list the main actions/milestones you hope to achieve in the first months/year. I.e. Researching your competitors, or completing your social media plan. Then, once you’re more confident in social media, you can include things like website traffic numbers, friend/follower numbers or sales milestones.

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| --- | --- | --- |
| **Action/Milestone** | **Date of expected completion** | **Person responsible** |
| What are the social media milestones that you need to complete starting from today? | When do you expect to complete them? | Who is responsible for delivering this milestone? |
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## 6. Monitoring/measurement activities

It may help to think of your answer to the following questions when completing this section:

* How do you measure the impact of your strategy?
* How has it improved your overall sales/awareness objectives?
* Is it effective? If not, how can you modify your strategy to get a better result?

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| --- | --- | --- | --- |
| **Social media activity** | **Date of review** | **Monitoring methods** | **Review outcomes** |
| E.g. website traffic, networking, paid advertising, in-app advertising, reciprocal linking, application development. | e.g. Month/Year | What tools did you use to measure/monitor the impact of your social media activities? | What were the results for the promotional period? Did your activities/milestones achieve your Key Performance Indicators (KPIs)? What were your sales/profit figures? How many new/repeat customers did you receive? How many customers visited your website? |

Social media budget [YEAR]

Double-click the table below to enter your details or attach your own budget at the back of this plan.

