

GUIDE

Social Media Strategy Guide

How to build your strategy from start to finish



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Whether you're a social media coordinator for a growing local business or an entrepreneur wearing many different hats, this guide will give you the professional framework you need to create a social media strategy from start to finish.

While there are a lot of social media strategy guides out there, we wanted to share what we've learned at Hootsuite. This guide provides an overview of the essential elements to include in your strategy.

With over 10 million global customers, 1700 enterprise clients, and millions of small businesses using Hootsuite everyday, we've been able to gain exposure to many different social media strategies. Every technique and tool you'll find in here is directly based on what we've seen work in the field.

We'll take you from start to finish, helping create a social media strategy that drives traffic, leads, and sales.

What is social media strategy, anyways?

In very simple terms, a social media strategy involves you showing your boss or company how you plan to use social media to help your company achieve its business objectives.

Most social media strategies will state goals such as "increase traffic" or "build more followers." But to take your strategy to the next level, you'll need to connect your objectives back to what really matters for the business.

6 essential steps to build your strategy



How to pick the right metrics to measure



Advice on audits and competitor research



These objectives vary. Some companies might need to increase customer satisfaction and brand loyalty; others might need to generate leads from local prospects. Your strategy will light the way, showing the exact steps the company can take to achieve its goals.



So what does a social media strategy actually include?

This guide will reveal the essential elements. But from a high level view, here is what every social media strategy should include:

The basic elements

- **An executive summary**—this helps your senior management quickly understand the key objectives and recommendations, without having to dive into too much detail.
- **A comprehensive audit**—this reveals current strengths, weaknesses, and issues that your strategy will address.
- **The key objectives**—these are the business goals the strategy will work to achieve.
- **The actual strategy**—these are the specific recommendations and tactics, showing how you'll achieve the objectives and issues uncovered during the audit.

The advanced elements

Once you've mastered the basics of social media strategy, you can include the more advanced components. These elements really bring your strategy to a professional level.

- **Earned, paid, and owned**—basic strategies often only focus on one or two types of media but to increase impact you need plan for all three types of social media: earned, paid, and owned.
- **Defining team roles**—it's important to provide clarity on who will be working on what and defining social media workflows.
- **Brand and policy documents**—you'll want to include official brand guidance and a social media policy.
- **Content and editorial calendars**—these are essential for professional social media strategies.
- **Listening protocols to mitigate risk**—you'll want to include workflows, establish a listening plan, and include recommendations for dealing with a crisis (such as a negative press article or product recall)

In this guide, we'll focus on the basics. If you want to take your strategy skills to the next level, we recommend Hootsuite University's video course "Creating an Effective Social Media Strategy."

This guide covers the essentials of a social media strategy. Take your strategic skills to the next level with the Advanced Social Media Strategy Certification from Hootsuite and Newhouse School. Learn more at: newhouse.hootsuite.com



Step #1: Begin with an audit

Conducting a social media audit will give you a clear picture of your current social media marketing efforts, which will directly impact how you will proceed moving forward.

Create a log to track existing results

To start, use a social media log to list all of your social properties, follower counts, engagement rates and average activity per week. This information will help create benchmarks, giving you data that can later be used to measure the success of your strategy. You should also be looking for underperforming social media channels. If a channel isn't producing results, either recommend to shut it down or provide tactics in your strategy to bring it back to life.

Analyze conversion rates

If you're tracking traffic from your social channels to your website, you'll want to examine not only the volume but also the conversion rates.

For example, you may only get 20% of your traffic from one social channel. But with a closer analysis, you find that this traffic drives repeat purchases, increases new email sign-ups, and is a significant driver of blog traffic. In contrast, other social channels drive a lot higher traffic but most of those visitors leave shortly after they arrive.

Next, gather audience intelligence

You'll also want to get a thorough understanding of your audience. This is a good time to sync with your marketing department and see if they have any information to share about your customers' age, gender, buying habits, and interests.



Other ways to gather audience intelligence include:

- Send a survey to your customers, gathering data about demographics and social media habits
- Conduct a qualitative interview with 5-10 customers or businesses in your target market
- Look on media sites in their advertiser section for data (often newspapers and magazines will share data about different audiences, so look for the “advertiser” section in a publication your audience would read, such as a trade magazine for B2B or a local magazine for a small business)

A better understanding of your audience will help you decide which social networks you should be engaging on. For a younger demographic, Instagram may be the best channel for your brand. For an audience of professionals, LinkedIn may be the best option.



Conduct a competitive analysis

The next step is a competitive analysis. This involves some basic intelligence gathering. Look at your competitors’ social media profiles, sign-up for their email promotions and analyze how they are reaching customers.

A few questions to guide your research:

- How does your competition use social media and what seems to be working for them?
- Do you share a similar audience? If so, what type of content seems to resonate best with their audience?
- If they run promotions, do they manage to hook their customers with a certain tactic or social channel?
- Are there elements of their strategy you could adapt to your own?



Step #2: Pick goals using the smart framework

Each social media goal you establish must be specific, measurable, attainable, realistic, and time-bound. To make a goal specific, it should focus on a precise area of improvement.

To test how measurable your goal is, ask yourself: can you set a target for the goal? Will you be able to tell when a goal is half complete?

For example, a goal of a 15% increase in web traffic in 4 months is measurable. A goal to “be more engaging on social media” is not.

It's also important also to set the proper expectations, especially if you are completing this work on behalf of clients. If sales have only been growing by 15% every quarter, then promising a 100% increase in sales will not be realistic.

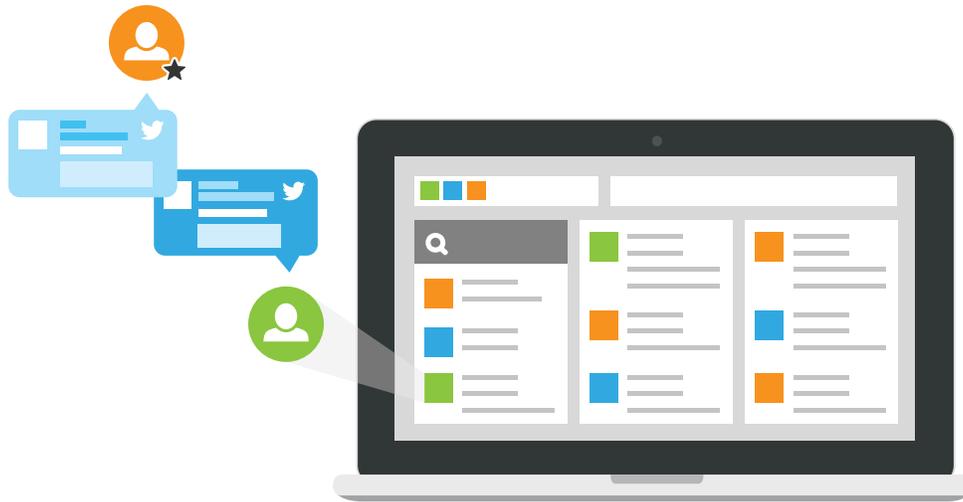
Finally, put a timeframe on your goal in order to measure success and benchmark progress.

Example of SMART goals

Let's say you're a local tourist attraction and your business objective is to increase ticket sales by 10% in 6 months.

Your corresponding social media goal could therefore be to increase unique visitors to your website from your social media properties by 30% in 6 months. The new volume in traffic will help the company to increase the number of conversions needed to reach those ticket sales goals.

- **Business goal:** increase ticket sales by 10% in 6 months
- **Social media goal:** increase social media traffic to website by 30%
- **Social media KPI:** number of unique website visitors sent from Twitter, Google+, and Facebook



Step #3: Define your voice and brand purpose

Although several people might manage your branded channels, the personality that consistently shines through those interactions should be that of your company, not of each individual employee.

While you may choose to use different social media platforms for different purposes, how you talk to your audience must remain stable across all mediums.

To start, check in with your marketing department and see if they have a document in place that defines your brand voice.

This should be the foundation for building your voice and defining your engagement style on social channels. Is your brand friendly or provocative? Fun or serious? Formal or casual?

- Ensure that your strategy clearly documents the personality of your brand. This will help to keep communications consistent.
- In your strategy, include a plan for keeping these brand documents easily accessible to the entire company. This becomes important during real-time engagement, especially during a crisis.
- Consider how this voice will relate to your community building approach and the type of content your brand will share.

Make sure to check that your messaging remains on brand at regular intervals and flag anything that doesn't meet the guidelines you've developed.

How to build your business with online communities

Learn about building your online community in the Hootsuite-Newhouse Advanced Social Media Strategy Certification. Explore the course curriculum now: newhouse.hootsuite.com/course-curriculum

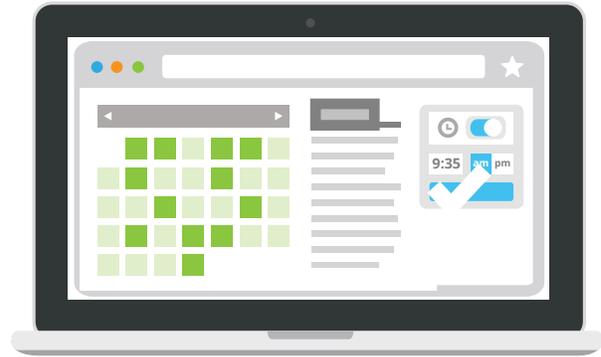


Step #4: Define reporting intervals

Other timing factors to consider are reporting intervals. In order to measure the success of your campaign, you need to evaluate its effectiveness over time.

You may check in on your progress on a monthly, quarterly or a semi-annual basis. Before you're due to report, leave yourself enough time to pull all the necessary data and produce a thoughtful analysis of the results.

Lastly, you'll want to take a look at any internal events that may need social media amplification like company volunteer events or award ceremonies and follow the same process to ensure you can offer adequate support.



Step #5: Add your content calendar

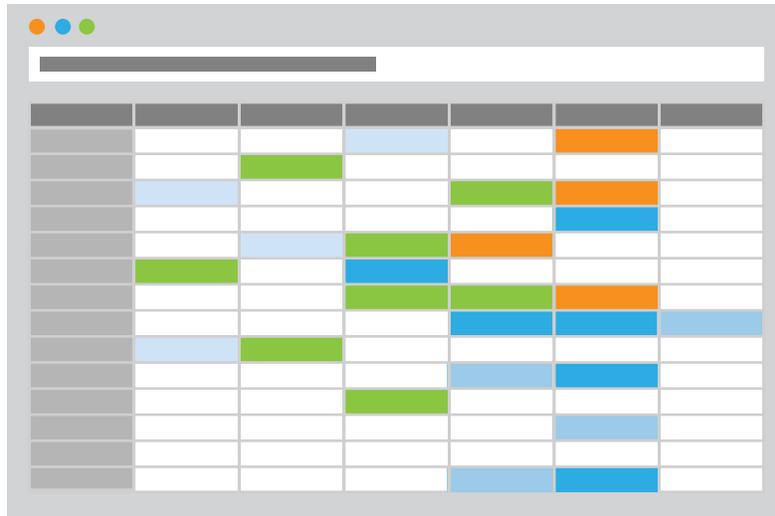
Content can come in many forms such as blog posts, videos, infographics and photos. It may be created by your team, crowd-sourced from your community, or curated from relevant, reputable sources. Keep in mind that content can be repurposed from one channel to the next.

For example, a photo essay from your blog may be divided into multiple posts on Instagram and Facebook. Creatively repurposing your content will maximize your resources and will help keep your messaging consistent.

Enroll in Hootsuite University to access this course today. learn.hootsuite.com/

Become a content planning master

The Advanced Social Media Strategy Certification delves deeper into the different components of content strategy and how it can be used to support your social media strategy and larger business objectives. Enroll today and get certified at: newhouse.hootsuite.com



Save time and plan ahead with this bulk upload template

When you own your own business, you can hardly spare the time required to publish Tweets or Facebook posts one by one throughout the day. To help save social media users valuable time, Hootsuite allows you to bulk upload up to 350 social media messages across all social networks.

To do so you need to create a .csv file of all the social messages you'd like to upload, placed in a specific format:

Column 1

Date and time. The accepted DATE format is: mm/dd/yyyy hh:mm or dd/mm/yyyy hh:mm. Be sure to identify which format you are using when uploading your file. Times must be set in the future (at least 10 minutes from upload time) and should end in either a 5 or a 0, i.e. 10:45 or 10:50.

Column 2

Your message. For Twitter there is a limit of 140 characters, including the URL (which reserves at most 23 characters).

Column 3

URL (optional): The full URL you want to include in your message.

Pro tip: We suggest using a plain text editor like TextEdit or NotePad.

Unfortunately, Excel usually causes formatting issues, so we don't recommend using it to build your spreadsheet.

[Download Our Bulk Upload Template](#)



Step #6: Measuring your success

The best time to think about how you'll measure the success of any given strategy is in the development stage. Before you undertake a certain strategy, take the time to establish baselines, targets and benchmarks, so when it comes time to report, you can clearly articulate your progress.

There are two basic ways to measure success: Quantitative and Qualitative reports.

Quantitative reports

Quantitative measurement focuses on numerical values and their growth or decline over time.

Here are a few ways to measure using quantitative metrics.

Track follower growth

Setting goals for follower growth is an excellent way to prove success. Setting a concrete goal—such as “we'll grow from 10,000 Twitter followers to 15,000 in three months—helps you clearly define what success looks like.

Engagement rate

Engagement helps to show whether the content and messaging actually resonates with your audience. For example, if you have 10,000 Twitter followers and your campaign only gets 50 shares then clearly the messaging isn't resonating. Engagement metrics include number of shares, blog comments, and mentions.

Conversion rate

This is the true metric that matters. In some industries—such as legal or B2B—a prospect might not share your campaign on Facebook but they will contact sales after reading your new eBook. Conversion metrics include number of downloads, email sign-ups, qualified leads, and sales transactions.

Qualitative reports

In contrast, qualitative measurement is a more nuanced approach to collecting insight and is best done on a post by post basis.

For example, you may have set a goal to increase interactions on your brand page. And while the number of comments on your content has gone up, it's necessary to also examine the nature of the comments.

Do they include many positive expressions of love for your products? Or is there a lot of disgruntled feedback expressing frustration with your service?

Sharing a really positive Tweet or email sent by a customer who loved a blog post isn't hard data but does show success and can be a very impactful addition to your reporting.



Establish a reporting interval

You'll want to establish reporting intervals. If you have a small audience, sending a report to your boss every week won't give you a clear picture of success as you won't have enough data. Instead, look at the trend over a period of weeks or at the end of each month.

If you are doing this work on behalf of clients, sending a regular report helps the client see the value in your work. But again, make sure you have enough data to see clear trends and growth.

Adjust your course with data

Once you've gathered the data on your key performance indicators, it's time to adjust course by either optimizing your strategy or pursuing a different direction.

Examine the social posts that were successful in leading visitors to your website and think about how you can adapt them to other social networks to generate similar results.

Maybe that type of content didn't resonate with your community on that network—can it be better targeted? Can it be posted at a different time?

Monitoring the response from your community is also important. Often your followers will be vocal about what kind of activity and content they appreciate, and what they don't, so keep your ear to the ground by listening to their feedback.

Benchmark yourself against competitors can reveal good insights. Is their following growing at a significantly faster rate? What are they doing that's working well and could you adapt some ideas to your social strategy?

Learn to build a bulletproof social media strategy

In this guide, we've covered the basics of what to include in your social media strategy. To advance your skills and expertise further, we recommend earning your Advanced Social Media Strategy from Hootsuite and Newhouse School.

This online course teaches advanced principles paired with in-depth exercises to give social media managers and professionals a master's grasp of social media strategy, along with the credentials to prove it.

This certification program will help you:

- Understand social media strategy at a high level to achieve your goals
- Master the skills needed to plan, execute, and monitor social media campaigns
- Learn at your own pace through comprehensive and self-directed online courses
- Prove your expertise with prestigious academic recognition and industry-leading credentials



Accelerate your career and your business. Earn academic credentials in Advanced Social Media Strategy from Hootsuite and Newhouse School today.