The Saylor Foundation's "Develop Your Own Social Media Strategy" and "Sample Solution"

Provided by Dr. David T. Bourgeois, Associate Professor of Information Systems at Biola University under a Creative Commons license.

Activity: Develop Your Own Social Media Strategy

Background: You will be creating a social media strategy for a small business or nonprofit. If you like, you may use the organization you currently work for or one that you admire. In order for the strategy to be effective, however, you must get familiar with the organization. This includes knowing its mission statement, organizational structure, and budget for social media. Optionally, you may use the example company listed below.

Instructions: In order to develop a well-thought out social media strategy, it makes sense to have some sort of basis or guideline for strategy development. For this activity, you will be using the "Social Media Strategy Framework" (see below). Begin by reviewing the framework in full, keeping an eye out for what information you will need to write your strategy and what decisions you will need to make. Next, you will want to review the sample solution, listed directly below the strategy framework. This will give you an idea of what your strategy might look like. Finally, try your hand at creating a social media strategy for your selected company by writing out the information for each step in the strategy framework. This activity should take you between 3 to 5 hours to complete.

Example Company: You are a startup nonprofit with the mission of getting clean water to people in developing nations. After taking this course, you are inspired to try to raise money online and then donate it to your favorite clean water charity. A generous donation from a family friend has given you the ability to do this for one year without having to earn income in any other way. You even have up to $5,000 to spend on the project if you like. Your mission statement is: "Enabling Americans to easily provide clean water to those in need." You realize that social media will be a key way to accomplish your mission. What should your social media strategy be?

"Social Media Strategy Framework"

Provided by Dr. David T. Bourgeois, Associate Professor of Information Systems at Biola University under a Creative Commons license.

1. Define the purpose and objectives for the use of social media by your organization. Create a short "mission statement" that will provide direction. It must be precise enough to guide in the development of the strategy, but it should not contain the details about which technologies will be used. Ideally, this will be two or three sentences long—no more than half a page. *Important: this mission statement should be completely aligned with the mission statement of your organization!*

2. Describe the target group(s) for your social media presence. Define the group(s) of people to whom your organization is targeting their social media presence. If you identify more than one group, consider developing more than one project, each with a separate strategy. Prioritize each target group and complete your strategy for one before starting it for the next.

3. Research your target group(s) use of the Internet and social media. How will you determine the needs of your target group(s)? Do not rely strictly on "gut feelings;" instead, research how they are interacting online. To make an informed choice on which Internet or social media tool(s) to use, you must first have a clear understanding of how to reach your target. This will also help you avoid bias in developing your strategy.

4. Determine the resources available. Who will work on this? What are their skills? What kind of budget will your organization provide? Are you willing/able to hire outside your organization? Is there a willingness inside your own organization to spend time and money on this? What role will existing staff play? Will you be using volunteers?

5. Analyze possible tools for use. What categories of social media tools will you be looking at? Can you use existing websites and tools (such as Facebook or YouTube) to accomplish your mission? Based on the answers to the preceding questions, what are the most appropriate tools? What are the advantages and disadvantages of each? What message will be communicated by the selection of these tools?

6. Select the tools you will use. This is where you make the specific selection of the tools you will be using. Can you defend your choice? Can you show a direct link between your goals (step 1), your target group (steps 2 and 3), and the resources available (step 4) to this choice of tool(s)? It is important that your tool selection is based on the most appropriate tools to meet your goals and your target group; do not pick a tool just because you are the most comfortable with it.

7. Determine the steps necessary to develop, implement and maintain your strategy. Once you have determined which tools you would like to use, you must develop a list of the steps needed to get the tools up and running. Do you have the appropriate resources (people/money) to do this? You then should determine the processes needed inside your organization to ensure that the strategy can be maintained for the long-term. Who will be tasked with the day-to-day operation of the site? After developing these lists, are you still confident in your selection of tools? Do you need to scale back?

8. Forecast results. This is where you set goals that can be measured. Ask: if we follow the strategy developed in steps 1 through 7, what can we realistically expect as results? If not satisfactory, go back to step 1! The goals must be measurable, so be sure that you have methods for measuring these results.

9. Assign roles and responsibilities. If you have not already done this, be sure you identify all the people involved in the various parts of implementing your strategy. Be sure you get commitment from them and (if necessary) their managers. You want complete buy-in on the project.

Besides the people you have identified in earlier steps, you will want to make sure you identify two more key roles:

1. the one person in your organization ultimately responsible for your online presence. Ideally this is someone on the paid staff of the organization. This person does not need to know all the technical details but does need to know how to get issues resolved.
2. the steering committee (ideally, 3 to 5 members) who will oversee the long-term health of the project. This should include at least one person with decision-making authority in the organization.

10. Write it up! Write up your strategy and share it with those in your organization. All members of the team should understand their roles in the success of this project. The documentation should also explain the different processes being put in place, who is responsible, and how they will be measured.

11. Carry out the plan. Have weekly and monthly meetings to monitor progress. The steering committee should meet regularly to monitor progress. Create a reporting and communications system, using a tool such as BaseCamp or a blog.

12. Evaluate results. Review both quantitative and qualitative statistics. Are you meeting your goals? Make updates to your plan based upon results. Be ready to do it all over again if necessary—technologies and culture change!

Sample Solution:

There is no "correct" solution to this activity. Below is a sample strategy that could be used as a possible solution to this activity. It uses the example company from the activity above. In this example, the "favorite clean water charity" is the World Vision Clean Water Fund.

1. **Define the purpose and objectives for the use of social media by your organization.**

The mission of our organization is "Enabling Americans to easily provide clean water to those in need." This is a broad mission statement that has many implications. For our use of social media tools, we have some different options. First, we could use social media to broadly advertise our cause and make them aware of how easy it is to donate. Second, we could use social media to directly solicit donations, putting donation links right inside of Facebook, etc. Third, we could use social media as an indirect way to solicit donations by focusing on developing relationships first, and then engaging about our cause. Finally, we could use social media to focus on one specific part of the World Vision ministry. This is not an all-inclusive list of our options but does give an idea of the different ways that social media could be used.

Because World Vision already has a nice online donation page set up, I think the best use of our money and time would be to help advertise it and drive people there. There is no reason to muddy the waters by setting up our own donation links and then somehow channeling that money back to World Vision. As for the option of developing relationships, this could be a secondary way to drive donations, but if we are limiting ourselves to one year on this project, then we need to work on something shorter-term. Finally, World Vision does not seem to have a way to direct their donation to a specific location or people group, so that would also muddy the waters. Therefore, our mission statement for online use will be as follows:

"We will use social media to enable our users to directly donate to World Vision's Clean Water Fund."

2. Describe the target group(s) for your social media presence.

Social media is being used by a large percentage of Americans, but in order to make the best use of our time and funding, we will be focusing our efforts on a specific group. Our mission statement says "all Americans," which limits our efforts to those in the U.S. However, within that group, we should focus on those who are most likely to donate to this cause. Our experience shows that today's college-age students are really connecting with clean water causes, so they would be a group to target. It also would be great to connect them to an organization like World Vision while they are still young. So, to be specific, our target group for social media use will be: Americans between the ages of 18-22.

3. Research your target group(s) use of the Internet and social media.

We all know that college-age students are big users of social media. But what can we find out about them? It will be important to find out: what social media sites do they use? How do they use them? Which sites are more likely to encourage donations?

Because this is such a large and diverse group, it does not make sense to use our limited time or funds to research their Internet use ourselves. The *Pew Internet and American Life Project* contains enough useful data to help us with our strategy and answer some of our questions. Here are some of their key findings:

- According to a recent report from the *Pew Internet and American Life Project*, 18-22 year olds make up 29% of MySpace users, 16% of Facebook users, 6% of LinkedIn users and 26% of Twitter users.

- 75% of LinkedIn users have a bachelor's or graduate degree, compared to 18% on MySpace, 35% on Facebook, and 39% on Twitter.
- 18-22 year olds are the most likely age group to "Like" a Facebook page (70% do so at least once a week).
- Facebook and Twitter are used much more frequently by their users than LinkedIn and MySpace. Some 52% of Facebook users and 33% of Twitter users engage with the platform daily, while only 7% of MySpace users and 6% of LinkedIn users do the same.
- "Controlling for demographics and other types of internet use, compared with other internet users a Facebook user who visits the site multiple times per day is two and a half times more likely to have attended a political rally or meeting, 57% more likely to have tried to convince someone to vote for a specific candidate, and 43% more likely to have said they voted or intended to vote (compared with non-internet users: 5.89 times more likely to have attended a meeting, 2.79 times more likely to talk to someone about their vote, and 2.19 times more likely to report voting)."
- "Currently, those under 40 are just as likely to say they donated through traditional or digital means (12% each). "
- Twitter is more diverse ethnically than other sites, with 25% of Internet-using African-Americans and 19% of Internet-using Hispanics using it on any given day.

From this research, we can take the following applications for our strategy:

- Facebook and Twitter are the most popular social media sites with our target group. They engage at least daily!
- It is definitely worthwhile to pursue online donations. Our target group is definitely willing to donate online.
- A Facebook page that users can "Like" would be an appropriate way to get our site out there.
- It might make sense to use Twitter as a way to reach out to a more diverse audience.

References:

- "Social networking sites and our lives" by by Keith Hampton, Lauren Sessions Goulet, Lee Rainie, Kristen Purcell. Posted on pewinternet.org on June 16, 2011.
- "Americans under age 40 are as likely to donate to Japan disaster relief through electronic means as traditional means" by by Kristen Purcell, Michael Dimock. Posted on pewinternet.org on Mar 23, 2011.
- "Twitter update 2011" by Aaron Smith. Posted on pewinternet.org on June 1, 2011.

4. Determine the resources available.

For this project, we have very limited resources: one full-time worker (me) and a budget of $5000. I know how to use social media and feel that I can probably do most of the work myself, so no consultants will be needed for basic social media work. If an application needs to be developed, it will probably be most proficient to find a third-party to do it. The social media campaign will be a large part of what this organization does; I will probably be spending 20 hours a week on it until it is successfully launched.

5. Analyze possible tools for use.

In reviewing our research (step 3), it looks as if the best two social media sites to use for this project would be Facebook and Twitter. MySpace, while having a large percentage of 18-22 year olds, is dropping in influence rapidly and LinkedIn just does not have enough of our target group to be useful.

Facebook has several ways for us to be integrated.

- We could create a page for our organization that people could "like." From there, we could post regular updates that direct people on the need to give, how to give, etc.
- We could utilize the Facebook "Causes" app, which would allow us to empower others as well as raise money ourselves.
- We could create our own Facebook app which explains our project and gives a simple way to donate to World Vision. This app could be installed on our own Facebook page or any of our fans' pages.
- We could buy Facebook ads that direct users to either our own Facebook page, our cause page, or directly to World Vision's site.

Twitter is a more limited platform. Some options for Twitter include:

- Creating a Twitter account for our organization. People could "follow" it, and we could post on how to donate. We could also post links directly to our Facebook page, our Facebook cause, or directly to World Vision.
- Creating a personal Twitter account and directing people to our Facebook page, our Facebook cause, or directly to World Vision.

We also have to face the question of having our own website outside of social media. Should we create our own presence so that we can post contact information, information on donations, and links to all our social media sites?

6. Select the tools you will use.

After reviewing our mission statement (step 1), our target users' Internet habits (steps 2 and 3), and our available resources (step 4), and comparing them to the possible tools we could choose (step 5), it makes the most sense to:

- Develop a Facebook page for our specific organization that focuses on directing people to the World Vision donation page. While a "Cause" page would be quite effective, there does not seem to be a simple way to ensure that the money

would go directly to the water program. Additionally, there are already several World Vision Causes pages – adding another would be confusing.

- Create a Facebook app called "Donate Clean Water" that will explain the project and place a prominent link to the World Vision donations page. This app will be installed on our own page and be available to be installed on anyone else's page. We will use a third-party consultant for this part of the project.
- Take out Facebook ads that target our specific demographic. The ads will point people to our Facebook page. We will use at least $1000 of our $5000 budget to jump start our page.
- We will not go with a Twitter campaign right now, with only one person working on this project, it would be distracting.
- We will not create our own website right now. As with Twitter, it will distract attention from the main point of the project: to get donations for clean water.

7. Determine the steps necessary to develop, implement and maintain your strategy.

Development and Implementation

In order for our strategy to be implemented, we will want to get our Facebook app created. A quick review of outside consulting firms shows that a simple Facebook app can be had for under $1000. We can work with a consultant to get this created in less than a month.

Next, we need to create the Facebook page. The page will be interactive, allowing wall posts from any of our fans. We can begin doing some promotion on the page before the app is installed, but we will not buy any ads until the page is ready.

Once the app is completed and installed on our page, we will buy Facebook ads targeted at 18-22 year olds. According to Facebook, as of June 27, 2011, there are just over 49 million Facebook users in that age range. This is so large a group, it would probably be wise to target a more precise group, so we will limit it to those who list "charity/causes" as an interest in their profile, which reduces the number to just over 7 million. If this produces too few hits, we will revisit it.

Maintenance

Once the page, app, and ads are in place, then we will need to ensure that the project moves forward.

- On a daily basis, I will log in to the page and do the following: post a story about the need for clean water, post a link to the app that people can install to support donations, post a link to directly donate to World Vision's water project. I will also review wall posts to be sure nothing inappropriate has been posted.
- On a weekly basis, I will review all of our site statistics to be sure that nothing is broken and that we are moving forward. This includes statistics for the app.

8. Forecast results.

Our goal is to increase donations to the World Vision water project. We have no way to directly measure the donations, but we can measure several other statistics:

- The number of people who "like" our fan page. Our goals for this will be to have 1000 people "like" our page each month. That is less than 0.2% of those we are targeting in our ads.
- The number of people who use our app. Our goal is to get 10% of the people who like our page to use our app: 100 per month.
- The number of people who install our app. This goal will be the same as the umber of people who use our app: 100 per month.
- The number of clicks on our ads. A 0.1% click through rate is considered a success here, so 700 clicks on our ads will be our goal.

9. Assign roles and responsibilities.

I will be doing most all of the work in this project and will be the main point of contact. We will find a Facebook app developer using elance.com. For my steering committee, I have recruited two trusted colleagues: Mary Lee and John Mendoza. Mary runs a local food bank and has experience using social media to help her cause (including Facebook). John is a lawyer for a non-profit in my town and has a passion for helping people. The steering committee will meet once a quarter to review our progress and compare our actual statistics to our goals. The committee will recommend changes as needed.

The strategy document can end here. The final steps (10-12) do not require anything additional written down.