

respond to consumers in real time, send private messages, share links to company news and recently published blog posts, and monitor trending conversations.

Social Media Plan in Six Steps

*Step 1: Research and Diagnosis*²⁷

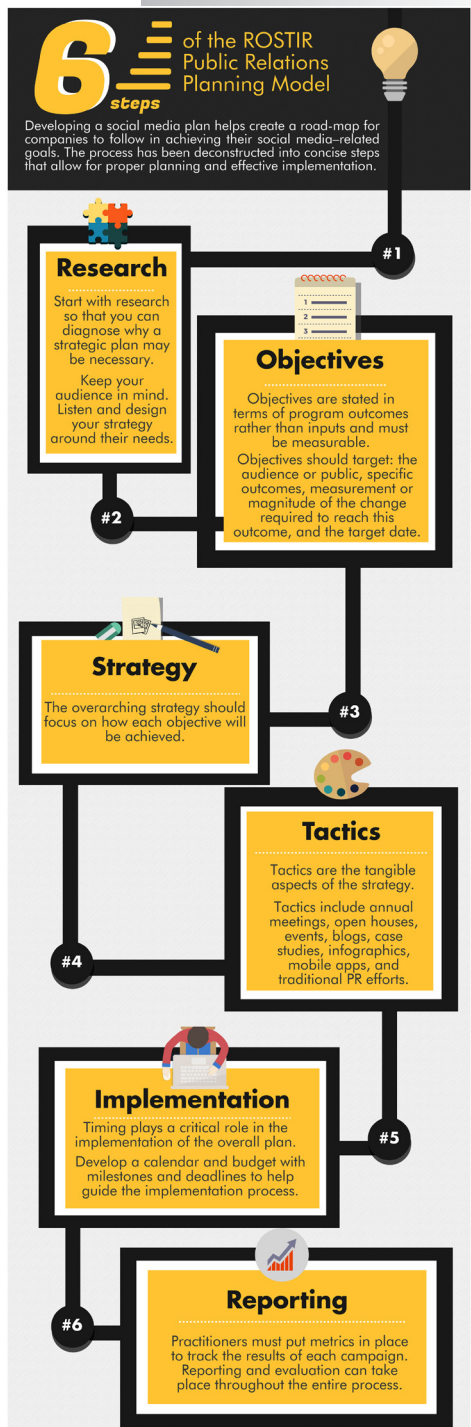
Both research and diagnosis occur in the first step. Practitioners conduct primary and secondary research to better understand the organization and its environment. Once research is completed, it is time to diagnose the challenges and opportunities by defining the problems or possibilities for the organization. Here the target audience(s) and stakeholders are pinpointed and prioritized. Whether the company has cornered a niche area, or your products or services target the general public, social media efforts should be directed toward a specific audience. For example, Axe body spray, a brand of Unilever Global, targets males eighteen to twenty-four years old; the craft beer industry centers on upper-class American males ages thirty to thirty-four years old; and Oreo targets just about every segment of Gen Z—females, males, African Americans, conservatives, and even urban dwellers—talk about being diverse!²⁸ Some campaigns have multiple audiences depending on the objectives set forth in the campaign. Take the time to properly understand the demographics that you are interested in connecting with.

Strategic plans usually include an introductory statement that outlines what the company wants to achieve and why. Valid objectives cannot be set without a clear understanding of the situation that led to developing a social media plan.²⁹ Some questions to ask when writing the situation statement include: Why is a plan necessary? Are we trying to overcome an issue or challenge? Is this a one-time product launch? Are we introducing new services? Are we looking to engage more genuinely on our social platforms? Is this long-term planning?

The following is an example from a PRSA Silver Anvil award-winning case study. Blue Cross Blue Shield Association, a healthcare insurance company, launched a national campaign targeted toward Millennials that would raise awareness and change behavior and attitudes surrounding health insurance.

With robust data from insuring one in three Americans, Blue Cross Blue Shield Association (BCBSA) developed a thought leadership program to better understand surprising trends showing declining millennial health and elevate the conversation to national audiences. The Millennial Health campaign gathered insights into key drivers impacting millennials' health and heard from millennials directly to collectively empower a generation to take a proactive role in maintaining their health. By holistically blending traditional PR tactics with events, social media, digital media, and storytelling, BCBSA brought thought-provoking data to life, sparking a candid dialogue about the well-being of millennials across America.³⁰

Organizations perform a SWOT (strengths, weaknesses, opportunities, and threats) analysis during the research and diagnosis phase. This is “a study undertaken by an organization to identify its internal strengths and weaknesses, as well as its external opportunities and threats.”³¹ This type of analysis can be performed for an organization, product, place, industry, brand, or person. According to MindTools, “what makes SWOT particularly powerful is that it can help you uncover opportunities that you are well-placed to exploit. And by understanding the weaknesses of your business, you can manage and eliminate threats that would otherwise catch you unaware.”³²



Developing a social media plan helps create a road map for organizations to follow in achieving their goals. The ROSTIR Public Relations Planning Model (research, objectives, strategies, tactics, implementation, reporting) includes six concise steps that allow for proper planning, effective implementation, and successful measurement. Source: Regina Luttrell.

Diversity-First Approach to Research and Diagnosis

In this first step, incorporating the Diversity-First Approach is simple. As a PR practitioner, work to become more aware of your own biases, considering how they might come into play in the specific campaign at hand. When conducting original research, ensure members are from heterogeneous groups.

Step 2: Objectives

Once you have a clear situation statement, setting objectives is the next logical step. Describe your organization's objectives for your social media plan using SMART objectives: specific, measurable, attainable, relevant, and timely.³³ Describe how these objectives support your organization's mission. The program outcomes will define the objectives. The objectives here are overarching in nature, not to be confused or intermingled with the specific objectives located in the tactics section of the social media plan. When the Department of Defense Joint Artificial Intelligence Center (JAIC) launched its intensive campaign *Leading Integrated Communication of the Ethical Adoption of Artificial Intelligence in the Department of Defense*, it set the following SMART objectives:³⁴

1. Increase engagement on all JAIC digital platforms by an average of 90 percent over one year.
2. Increase JAIC interactions across social and digital platforms over one year to achieve at least 90 percent alignment with the command mission objectives and help foster public dialogue on the responsible and ethical use of military artificial intelligence (AI).
3. Ensure at least 90 percent of speaking engagements correctly align with key messages and support the director's vision and mission guided by the DoD AI strategy.
4. Establish a measurable baseline process for sharing JAIC information and communication guidance with relevant communicators in the military services.
5. Establish a measurable baseline to assess how JAIC communication efforts are shaping the tone of dialogue and media reporting of AI ethics and JAIC messages.
6. Establish a measurable baseline for public communication analysis and assessment summary to help enhance the effectiveness of the JAIC and DoD AI initiatives in the United States.

Diversity-First Approach to Objectives

When evaluating objectives, take into account why organizations target some audience and not others. Which stakeholders are present? Are they diverse?

Step 3: Strategy

Strategies are the big-picture decisions made to utilize specific channels. The strategy focuses on achieving the objectives. Describe how and why various campaign components will accomplish the overall goals. Guidelines and key messages are often included in this section. The aim in this section is to leverage organizational strengths. Strategies should reflect the unique internal and external organizational environment to tell the right story and connect with the intended audience. When Mercedes-Benz USA implemented its campaign “Greatness Lives Here,” its strategy was simple:

“Advance MBUSA’s brand as a committed neighbor—as a company that cares about the current and future state of Atlanta and applauds unsung heroes doing the heavy lifting for the betterment of the city.”³⁵

Strategies are not meant to be complex. As shown here by Mercedes-Benz, a simple statement is all that is necessary.

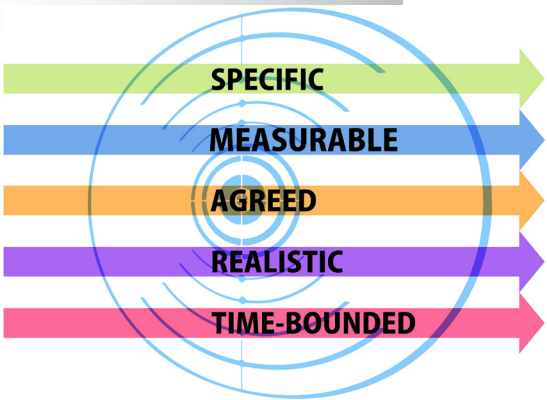
Up to this point, the format that we have followed mirrors that of a traditional PR plan. This is where the social media plan begins to diverge from the PR plan. In general, most of the platforms used within the social sphere are included in this plan. However, as we have previously read, not all social media channels are appropriate for every business. Tactics can be unique for each business and consumer. Companies must decide which social platforms are right for their audiences. It is okay if Instagram is not part of your plan. If a company’s audience is not engaged on Instagram, then it might not be a smart use of resources to maintain an Instagram account. Knowing your audience and its members’ social habits is essential to successful implementation of a social media plan.

Diversity-First Approach to Strategy

As you develop a sound strategy, create messages with specific audiences in mind and be deliberate about the channels you choose.

Step 4: Tactics

Tactics are the tangible aspects used when implementing the plan. Tactics include all areas found within the PESO Model—paid media, earned media, shared media, and owned media. Near each tactic, you will see that I have included the associated category from the PESO Model that the tactic would fall into. Keep in mind that paid, earned, shared, and owned overlap, and crossover does occur. For example, when you are developing content on behalf of your organization for the company-owned



SMART objectives allow practitioners to develop specific, measurable, agreed/achievable, realistic, and time-bound goals. The more granular your objectives are defined, the easier it is to demonstrate results. Source: Creative Commons, Pixaby.

website or blog, your actions would fall into the “owned media” area of the model. However, once you cross-promote that content on Pinterest and a consumer pins and shares that content, it then becomes “shared media.” Step 4 tasks practitioners with developing creative and effective messaging supported by research.

Social Press: Just as PR professionals pitch traditional journalists, PR professionals and social media strategists must pitch bloggers and other online influencers. (Earned Media)

Time Spent: Consider how many hours per day, week, and month will be devoted to this tactic.

Objectives:

Regularly update bloggers about products and services. Conduct interviews, conferences, and networking events.

Metrics:

Posts and referrals from the social press
Engagement and conversation
Influence
Opinion and advocacy
Impact and value

Blogs: Blogs are a simple way to connect with and share timely, relevant information with customers. They are a direct communication channel with your target audience. (Owned Media)

Time Spent: Consider how many hours per day, week, and month will be devoted to this tactic.

Remember, a good rule of thumb is to post once a day (if possible), or, at a minimum, three times per week.

Create an editorial calendar for your blog to stay motivated and to provide a guideline for content.

Objectives:

Increase recognition: for example, x number of posts.

Increase engagement: for example, encourage comments; add social sharing buttons.

Metrics:

Engagement and conversation
Influence
Opinion and advocacy
Impact and value
Number of posts
Number of social shares—Digg, Twitter, Facebook, etc.
Audience growth—unique and return visits
New subscribers
Inbound links clicked

Social Networks: Various social networking platforms may be part of a social media strategy. This section includes some of the most frequently used sites. (Owned Media, Shared Media)

Time Spent: For each social network, consider how many hours per day, week, and month will be devoted to each social networking site.

Establish a goal for the number of posts per day.

Share engaging content, videos, links, images, charts, and data.

Make sure to promote upcoming events, show behind the scenes, and give sneak peeks.

Create special event pages.

Use converged media tactics whenever possible to cross-promote messages across all social media.

Metrics: Metrics for each social networking site follow AMEC (International Association for the Measurement and Evaluation of Communication) measurement standards. In the measurement and analytics chapter of the text, we will take a deeper dive into how to measure social media efforts.

- Exposure
- Engagement
- Influence
- Advocacy
- Impact

Social Apps, Voting, and Crowdsourcing:

Time Spent: Consider how many hours per day, week, and month will be devoted to social apps, voting, and crowdsourcing. (Owned Media, Shared Media)

Objectives:

- Add social elements to every strategic campaign to expand company reach and increase engagement.
- Run promotional campaigns and contests to spread the message.
- Promote content when applicable via social crowdsourcing and voting sites.
- Let consumers have a say through crowdsourced events or interactive voting.

Metrics:

- Engagement and conversation
- Influence
- Opinion and advocacy
- Impact and value
- Trends over time

Video: Social video, live or recorded, that is designed to be seen and shared through social networks. Video can include traditional advertising, such as a commercial, or something as open as a live stream on Snapchat or Periscope. (Paid Media, Shared Media, Owned Media)

Live Video:

Time Spent: Consider how many hours per day, week, and month will be devoted to creating, posting, and managing live-streaming apps like Periscope, Facebook Live, Twitter Live, or Instagram Stories. (Owned Media, Shared Media)

Objectives:

- Create content that can easily be streamed.
- Engage with audiences through live Q&A sessions.

Metrics:

- Engagement and conversation
- Influence
- Opinion and advocacy
- Impact and value

Online Video:

Time Spent: Consider how many hours per day, week, and month will be devoted to creating, posting, and managing online videos. (Owned Media)

Objectives:

- Create a video series.

Upload videos to the company website, YouTube, Facebook, Vine, Instagram, and other video platforms.

Metrics:

- Engagement and conversation
- Influence
- Opinion and advocacy
- Impact and value

Podcasting:

Time Spent: Consider how many hours per day, week, and month will be devoted to the development of podcasts. (Owned Media)

Objectives:

- Create a podcast directory.
- Use past webinars in the resource section on your website.
- Promote content through podcast directories and iTunes.
- Interview and record company thought leaders; share their insights with your community.

Metrics:

- Engagement and conversation
- Influence
- Opinion and advocacy
- Impact and value

Presentation Sharing:

Time Spent: Consider how many hours per day, week, and month will be devoted to developing content to share on sites (such as SlideShare). (Owned Media, Shared Media)

Objectives:

- Highlight organizational thought leaders—if someone from your company is presenting at a conference, post the presentation to SlideShare.
- Determine the number of SlideShare presentations that need to be created on a monthly or quarterly basis.
- Post company webinars, slide decks from conferences, and infographics with important data.
- Use specific keywords for SEO optimization.

Metrics:

- Engagement and conversation
- Influence
- Opinion and advocacy
- Impact and value

Diversity-First Approach to Tactics

As you pull together the tactics for the social media plan, pull out the Diversity & Inclusion Wheel for PR Practitioners and look for opportunities to include more representation from different demographic; include different examples, stories, images, and experiences in the campaigns.

Step 5: Implementation, Budget, and Timeline

The objectives, complexity, and timing of the campaign will ultimately dictate the timelines. Some campaigns last six weeks, while others can last six months. Campaigns can be seasonal or targeted to a specific product or event. For example, the Lay's® Do Us a Flavor™ Choose Your Chip Contest accepted entries for four months in an effort to develop new potato chip flavors. As entries were submitted, members of the public were allowed to vote on their favorite chip for an additional three months. Additionally, it is important to remember that every social media plan requires a budget. Organizations are interested in understanding the scope of expenses related to the campaigns. Budgets should take into consideration both the human resource and out-of-pocket expense components. Allocate at least 10 percent of a budget to unexpected costs.

Diversity-First Approach to Implementation

Monitor the campaign. Be open to updating, adjusting, and revising tactics and messages based on how the campaign is progressing.

Step 6: Reporting and Evaluation

Reporting, also known as evaluation, directly correlates to the stated objectives. Practitioners must put in place metrics to track the results of each campaign. Reporting and evaluation do not have to take place at the end of a campaign and honestly can occur at any point. Savvy practitioners evaluate the metrics throughout the process. In doing so, a practitioner will know whether the stated objectives, strategies, and tactics are resonating with the intended audiences. It is appropriate to measure objectives at any point during the implementation phase through the conclusion of the PR campaign.

Diversity-First Approach to Reporting and Evaluation

Look back to evaluate whether the campaign succeeded in its IDEA goals. What went well? What could be improved upon next time?

After completing these six steps, an organization has developed a complete social media plan. This plan can be incorporated into an existing PR plan or used as a stand-alone depending on how the plan was developed.

As you read each “Theory into Practice” case study, think about the Diversity-First Approach and the six steps described in this chapter, along with elements from the Circular Model of SoMe for Social Communication and the strategic planning framework ROSTIR (research/diagnosis, objectives, strategies, tactics, implementation, and reporting), as well as the tactical elements of PESO (paid, earned, shared, and owned media). Try to identify which section the information would likely fall into within the framework of the social media plan. This will provide you with the opportunity to practice populating a plan, which can then be used as a resource for quick reference.

THEORY INTO PRACTICE

A Bright IDEA

As you begin this exercise, it's important to establish clear definitions of inclusivity, diversity, equity, and accessibility. The following definitions will help you understand the differences so that you can apply them to this exercise:

"Inclusivity: All feel welcomed and valued

Inclusion is the act of creating environments in which any individual or group can be, and feel, welcomed, respected, represented, supported, and valued to fully participate.

Diversity: All the ways we differ

Diversity includes all of the ways in which people differ, encompassing the different characteristics that make one individual or group different from another. While diversity is often used in reference to race, ethnicity, and gender, we embrace a broader definition that also includes age, national origin, religion, disability, sexual orientation, socioeconomic status, education, marital status, language, physical appearance, geography, and any other identifiers that make one individual or group different from another.

Equity: All having the opportunity to fully participate

Equity encompasses the policies and practices used to ensure the fair treatment, access, opportunity, and advancement for all people, while at the same time trying to identify and eliminate barriers that have historically prevented the full participation of some individuals or groups.

Accessibility: Of any and all abilities

Access refers to the commitment for everyone to be included in all programs and activities."¹

Having established clear definitions, let's move into the exercise.

Step 1: Choose a recent campaign from the Arthur W. Page Society case competition, PRSA Silver Anvil winners, or from the website of a digital agency such as 360i. Once you identify your case, read through and make notes that illustrate direct connections to IDEA principles. You might want to go online to assess the digital

assets that are available for the campaign. For example, look at the brand's website, social media channels or TV commercials. If possible, see if you can identify the team that executed the campaign. Was the team diverse? In this step begin to connect specific areas of inclusivity, diversity, equity, and accessibility to the campaign you are working on.

Step 2: In the next step, use a blank model of the Diversity & Inclusion Wheel for PR Practitioners. You can simply draw a circle in the center of a piece of blank paper with a smaller circle in the center as your guide. In the smaller circle, see if you can identify at least two aspects from the center of the wheel in the campaign. In the larger circle, see if you can identify at least four aspects from the external portion that you believe were implemented in the campaign. In this step, try to identify the multiple aspects of IDEA in this particular campaign. In recognizing this, you should begin to understand the importance of multidimensional diversity.

Step 3: Now that you've examined this campaign, look up the diversity and inclusion policy of the brand featured in the campaign. Analyze the principles from the Diversity & Inclusion Wheel for PR Practitioners and compare them to the campaign you just evaluated. Do the company's mission and values align with the campaign? If not, why? What could this brand do to improve their commitment to IDEA? If yes, what is this brand doing right?

Step 4: Finally, discuss your findings with others in the class. Provide examples from your campaign to fuel the conversation.

By examining whether a previous campaign included IDEA aspects, you can begin to build a foundation for the future to use and refer back to often when conducting research, developing content, identifying strategies, or planning campaigns.

¹ Indiana Arts Commission, "Inclusion Diversity Equity and Access (IDEA)," *IN.gov*, accessed December 30, 2020, <https://www.in.gov/arts/programs-and-services/resources/inclusion-diversity-equity-and-access-idea/#:~:text=IDEA>