



Social Media
Campaign Checklist

Planning a social media campaign can be a daunting task. Where do you start? What do you need to plan for? This checklist will help you organize your entire campaign in six essential phases.



Phase 1: Definition



Phase 2: Research



Phase 3: Planning



Phase 4: Execution



Phase 5: Measurement and Optimization



Phase 6: Insight and Reporting



PHASE 1: DEFINITION

Goal: Define the mission of your campaign, understand of how it is meant to impact the business, and get buy-in from leadership.



Write your campaign's mission statement. Include high-level goals, like greater brand awareness or lead generation, so you can determine the correct audience, tactics, and distribution strategy for your campaign.



Validate your objectives with leadership. Before spending time on the plan and research, make sure you have buy-in to move forward.



Make it clear who on your social or digital team will project manage the campaign to ensure all activities are on track and on schedule.



PHASE 2: RESEARCH

Goal: Research campaign needs and tactics to discover the best possible way to achieve your objective.



Identify software or tools needed for research and analysis, such as Google Analytics for website metrics



Research competitors' campaigns for tactics



Research audience segments and interests to define your ideal target audience, and the best way to reach them



Research conversations and past campaigns to determine audience interest, participation, channels used, and benchmarks for tracking your own campaign



Consult with other parts of your marketing organization to collect insight and ideas from their programs



Identify tools needed for execution of social campaigns, including workflow, visual content creation, monitoring campaign hashtags in real time, and a social analytics solution that can handle research, optimization, and reporting



PHASE 3: PLANNING

Goal: Use insights from your research process to develop a clear business goal, identify the tactics needed to achieve that goal, and the KPIs to measure your progress.

- Establish a campaign messaging document with the key points, branded terms and hashtags, and “feel” that you’d like to convey
- Develop a timeline for the campaign with a clear beginning and end
- Assign responsibilities to the appropriate team members with clear ownership and accountability
- Prep all parties with necessary campaign documents
- Establish a campaign calendar based off research findings that includes all channels, content types, copy, and video, with each asset tailored to the network it’s planned for
- Establish metrics and KPIs to determine success, including easy-to-track KPIs like engagement, volume, audience growth rate, clicks, etc., as well as metrics that get you closer to the business goal like increased share of voice, leads, sales, etc.
- Develop a measurement cadence and post-mortem plan to gauge effectiveness and create a reporting process for the campaign
- Establish a budget for all software, resources, and advertising components of this campaign
- Get approval for your campaign strategy, plan, and budget



PHASE 4: EXECUTION

Goal: Make it happen! Use your campaign plan, key messages, timeline, and measurement process, and put it all into action!



Create all content assets, formatted for the appropriate network and in line with your strategy and messaging document



Schedule all content in your publishing tool. Also prepare the content you plan to post manually



Set up keywords and scheduled reports to monitor, benchmark, and optimize content as you go



Monitor (and report on, when appropriate) progress to goals



Schedule regular standups with all stakeholders to share insights, status updates, and roadblocks



Plan time for messaging and content to respond to and further engage people



PHASE 5: MEASUREMENT & OPTIMIZATION

Goal: Collect data and measure the effectiveness of your campaign. Keep in mind, post-campaign measurement is different than the listening activities and scheduled reports used during the actual campaign.



Measure of brand activities to identify how successful your team was at executing the plan



Measure audience engagement for impact on overall awareness, interest, and share of voice. This analysis should also tie in the brand activities to identify opportunities to increase, decrease, or eliminate effort with specific networks and content types



Measure impact on your overall business or marketing objective set at the beginning of the campaign, and the goals established during the planning process. This should be as specific as possible, but also an honest analysis of the gains attributable to this specific campaign



PHASE 6: INSIGHT & REPORTING

Goal: Document your learnings and what you accomplished. Report on the campaign to other teams.



Collect insight that can be used for optimization both within the social team, and with the broader marketing team as a whole. What messaging resonated, which tactics worked (or didn't) and what can you do better next time?



Create a campaign brief specifically to share with your boss that highlights the success or failure of the campaign, focusing on the impact that campaign had on your overall objective and marketing goals



Share your findings with the appropriate stakeholders

ABOUT SIMPLY MEASURED

Simply Measured is the most complete social analytics solution, empowering marketers with unmatched access to their social data to more clearly define their social strategy and to optimize their tactics for maximum impact.

Our goal is to put the tools to understand business data in the hands of business users. We think reporting should be simple, attractive, and accessible for everyone – not just data scientists. Our software streamlines the process from data to deliverables and eliminates the countless hours spent on everyday reporting tasks. We do this by putting cloud data sources at your fingertips, providing a marketplace of best practice reports, and allowing you to generate beautiful solutions on the web, in Excel, and in PowerPoint with a couple of clicks.

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