Spredfast®

Social Campaign Planning Checklist

A Stress-Free Guide to Concept and Collaboration

Planning & Discovery

If you downloaded this checklist, it's probably because you are looking for a better way to plan your social campaigns. You're in good company—even the most sophisticated social teams could stand to iron out a few kinks in their planning process.

We created this step-by-step checklist to help keep your team on track. Use it to plan the social elements supporting an integrated campaign or to build a purely social activation. By the time you complete this checklist you will have uncovered eight essential elements to building a successful social campaign. Get your pens ready—let's do this.

8 Steps to a Successful Campaign

1. Goals Set S.M.A.R.T. goals for your campaign that ladder up to your overall social program goals and key business objectives.

2. Theme & Concept Clearly state the primary message you want to communicate and the desired audience reaction.

3. Timeline Develop a timeline for the campaign with a clear beginning and end (including plenty of time to develop offers, copy, and creative).

4. Audience Identify your target audience and determine where they spend their time on social channels and what motivates them.

5. Creative & Voice Bring the campaign concept to life with creative and copy across multiple channels.

6. Engagement & Response Build an engagement and response plan that is flexible enough to cover planned, best-case, and worst-case scenarios.

7. Measurement Establish a measurement and reporting process to track against your established goals and KPIs.

8. What's Next Share results with stakeholders and archive learnings to inform future campaigns.

A Word About Resources:

The right people, budget, and tools are essential ingredients of a successful social campaign. We'll touch on these elements throughout the checklist, but it's always smart to know what resources you have available at the outset of a campaign.

Team

Who do you need to successfully execute your social campaign? What are their roles and responsibilities? This includes both internal resources and any agencies or partners that will contribute to the success of the campaign.

Budget

Feel free to roll your eyes if any of your colleagues are still suggesting that "social media is free". Then develop a campaign budget inclusive of any creative and production needs, social ad spend, and any other campaign costs.

Tools

What technology solutions do you need to manage the campaign from start to finish? Think about content creation, workflow and planning, listening and engagement, and social/web analytics solutions. If you are a Spredfast customer, your bases are covered.

Ideas:

Step 1 | Goals

The first step to any successful social campaign is setting S.M.A.R.T. goals. Let's get started.

- **S** specific
- **M** measurable
- **A** accoutable
- **R** realistic
- **T** time-bound

Discovery

- ☐ What is your goal for this campaign?
- ☐ Is this goal aligned with your overall social program goals?
- ☐ How does this goal ladder up to your key business objectives?
- ☐ How will you measure goal attainment?
- ☐ What tools will you use?
- ☐ Who is responsible for campaign success?
  Who is the ultimate stakeholder?
  Who is the project lead?
- ☐ Is your goal attainable based on past performance, benchmarks and available resources (people, budget, time)?
- ☐ What is the timeline to achieve this goal?

What is your goal for this campaign?
Just one?! While you may have several results you want to achieve with a single campaign, the clearer you can state your primary goal, the more you can focus on achieving it.

Not Sure How to Define Your Goals?

Here are some of the most common goals and associated key performance indicators (KPIs):

Brand Reach	Audience Size Potential Impressions Actual Impressions
Brand Engagement	Facebook: Likes, Comments, Shares Twitter: Retweets, Replies, Favorites LinkedIn: Likes, Comments, Shares
Lead Generation	Click through to digital properties Conversions to Download, RSVPs, etc.
Sales	Cart Size, Conversion Rates
Social Care	Ratio of inquiries to responses Service Level Agreement Response Time

Fill-in-the-blank:

The goal of the _____ (campaign name) campaign is to _____ (specific intended results) by _____ (point in time). This goal is _____ (feasible/stretch/unrealistic) based on _____ (benchmark). We will measure _____ (KPIs) to evaluate success.

Ideas:

_____

_____

_____

_____

_____

Step 2 | Theme & Concept

Your campaign concept should support the goal you just defined. Aligning your social and creative teams on the campaign approach up front will save you a lot of headaches down the road.

Discovery

- ☐ Does your social campaign relate to an existing campaign? What existing elements (offers, creative, messaging, etc.) must be consistent across channels?
- ☐ What type of campaign is this? Is it a seasonal campaign (i.e. Holiday or Back to School)? A product launch? An event?
- ☐ What is the primary message you want to communicate?
- ☐ What do you want your audience to think, feel, or do after engaging with the campaign?
- ☐ Do you plan to use any specific tactics, such as a celebrity endorser or sweepstakes?
- ☐ What digital or physical destination will you be driving towards (i.e. a landing page, ecommerce site, brick and mortar store, or live event)?
- ☐ Who owns what? Clearly establish decision makers for key campaign components (such as creative, copy, channel strategy, etc.).

Ideas:

Think Big:
Tips for a Productive Brainstorm Session

Start building a high-level campaign messaging document that includes key points, the overall "feeling" that you'd like to convey, and even specific branded terms and hashtags. Here are some tips to get there:

Yes, And...

Borrow a line from improvisational comedy and spend time as a group creating a master list of ideas. No "nos" allowed.

Pin It!

You probably already use Pinterest to plan home renovations and wardrobe overhauls. Make use of shared boards to Pin ideas and examples of other successful executions to get your team inspired. Worried about prying eyes? Use secret boards.

Look Back.

Review similar campaigns you've executed in the past. What worked well? What didn't? This litmus test can help you trim your list of good ideas down to just the great ones.

Ideas:

Step 3 | Audience

Once you have the right message, you want it to reach the right people. Before creating targeting profiles or promoting content, be sure you really know your audience.

Discovery

- ☐ Who makes up your audience in your social channels? (Keep in mind—your audience on Twitter may look very different from your audience on Facebook, and so on.)
- ☐ What are those audience segments interested in?
- ☐ Who is your target audience for this campaign? Where do the target audience and your social channel segments intersect? (This will help you identify key campaign channels.)
- ☐ What motivates your target audience? (i.e. Do they want deals? To look or feel a certain way? To receive exclusive content?)
- ☐ What channels and tactics have worked best in the past to reach this audience?
- ☐ Which channels and tactics will best support this particular campaign, its message, and goals?

Think about a person, not just a persona

Your audience isn't one-dimensional, so don't define them that way. In addition to demographic data (and firmographic data if you're B2B), clarify the interests, obligations, and desires of your audience.

Listen Up!

People already send a lot of signals about who they are, their preferences, and how they spend their time. Using a tool like **Spredfast Intelligence** to interpret the abundance of social data available can help you identify signals within the noise.

Step 4 | Creative & Voice

Your team is aligned on the high-level campaign concept. It's time to bring the vision to life with creative and copy.

Discovery

- ☐ How will the creative approach translate across individual channels? (Don't forget about paid specifications!)
- ☐ Will you use a branded hashtag or will you be tapping into a broader conversation?
- ☐ Which brand elements must be included? (Consider creative elements like logo, fonts, colors, and copy requirements such as voice and tone).
- ☐ Will you be working with agency partners or outside vendors to execute this campaign?
- ☐ What budget do you have available? How will you coordinate final approval and sign-off?
- ☐ What types of visual content will support your campaign? Think about format (images vs. short- or long-format video) and style (highly-polished branded imagery vs. authentic user-generated content.)

Size Matters

As social network interfaces and paid offerings continue to evolve, it's important to stay up-to-date on video and image specs. Keep our Social Video and Image Size Guide on hand.

Room to Doodle:

Hold a Content Line-up

When production work begins, do a side-by-side comparison of your content to look for campaign consistency. You should double check that individual elements align with the style and specifications of the networks and channels where they will be shared.

The Usual Suspects:

Organization

Stay organized by housing these elements in a single, easily accessible location. In **Spredfast Conversations**, the Content Center allows users to store content with useful labels, set embargoes on content availability, and instantly optimize image sizes by social network within Image Studio.

Step 5 | Engagement & Response

One surefire sign of a successful social campaign is that it gets people talking. Put together an engagement and response plan that is flexible enough to cover best-case and worst-case scenarios.

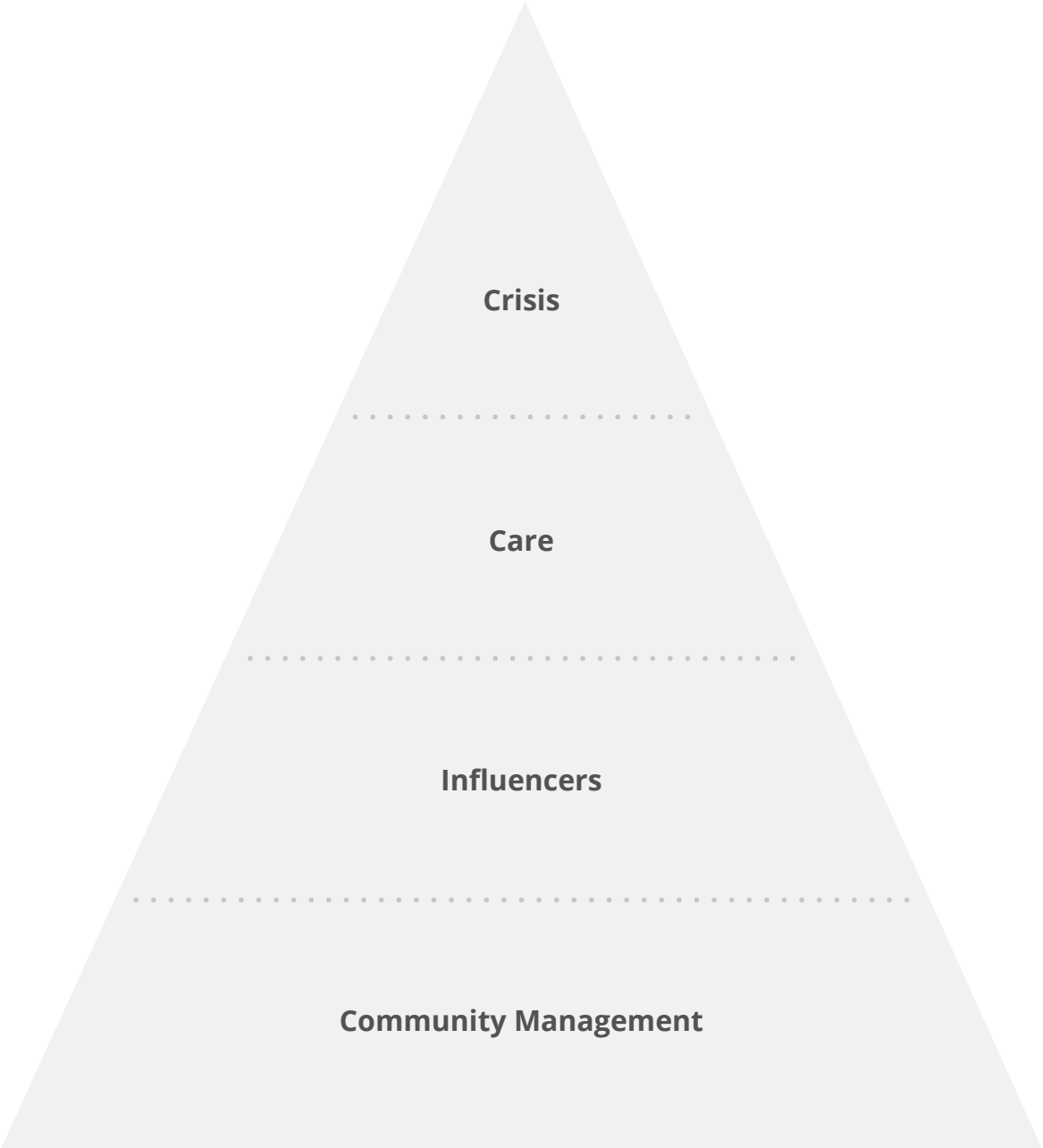
Discovery

- ☐ Which teams need to be involved in response planning? Do you need legal sign-off on a sweepstakes? PR approval when working with an edgy celeb spokesperson?
- ☐ How will you reward your most active community members?
- ☐ Who are the influential members of your community? How can they help amplify your campaign? How do you plan to engage with them?
- ☐ Are you prepared to care on every channel? Answering inquiries in 140 characters on Twitter is different than addressing questions within your Instagram comment threads.
- ☐ "What's the worst that could happen?" Ask this tough question up front to avoid a panic attack if limited quantities of a highly sought after item runs out or your "viral" video gets a lukewarm reception. Plan ahead.

Ideas:

Build a Well-Balanced Engagement & Response Plan

A detailed engagement and response plan will cover the good, the bad and the ugly. Take some time to think through how you will respond to community members that engage with your campaign, and how you'll amplify your campaign with influencers. Don't skip planning for care or worst-case, crisis scenarios.



Step 6 | Timeline

With a clear goal, a specific audience, and a killer creative idea in mind, the only thing left to do is get started. Don't let logistics trip up a winning campaign.

Discovery

- ☐ Do you have a timeline for the campaign with a clear beginning and end?
- ☐ Have you created a work-back plan that incorporates ample time to develop offers, copy, and creative? Include time for revisions.
- ☐ When the campaign has ended will any assets continue to live on? What needs to be updated, archived, or removed?
- ☐ What concurrent campaigns and offerings are running? How will this affect the cadence of campaign content?
- ☐ Do you have a regularly scheduled standup with all stakeholders to share insights, status updates, and roadblocks?
- ☐ If this is a multichannel campaign, do you know when all other campaign elements will go live (out of home, email, radio, print, etc.)?

Campaign Timeline

Provide all team members with access to a comprehensive, shared campaign timeline. Within **Spredfast Conversations**, users can collaborate and maintain full visibility within the calendar view.

Step 7 | Measurement

One of the most important pieces to running a successful social campaign will be the measurement and reporting that happens along the way. Even if you fail to meet your established goals and KPIs, you can learn a lot about what worked (and what didn't).

Progress reports, a wrap report, and post-campaign debrief will give you the chance to discover your campaign's successes, as well as areas for growth that you can implement in the future.

Discovery

- ☐ What tools will you use to measure progress (i.e. social software platform, web analytics, CRM, listening tools)?
- ☐ What do you need to set up ahead of time (keywords, trackable URLs)?
- ☐ What is your reporting cadence and process to measure campaign success?
- ☐ What is the expected timeline for your final campaign wrap report?
- ☐ What is the expected timeline for your debrief?
- ☐ Who needs to be included in your final report? (Probably your teams identified initially, but maybe some execs, too!)

Creating an Effective Report:

Don't report every data point you have. Find the ones that are important and tell a story. Display your findings in visual ways. Think of the best way to effectively report your findings. Is it a Powerpoint? Is it an infographic? Do you send out an email or present outcomes in a meeting?

Things to Measure

During the Campaign:

- ☐ How are you making progress against your goals and KPIs?
- ☐ Where is there room to make tweaks and optimize while your campaign is still running?

After the Campaign:

- ☐ Was your campaign effective?
- ☐ Did you meet your campaign goals?
- ☐ Did you make progress against your overall social and business goals?
- ☐ Did the results of this campaign merit the investment of time, money, and effort?

Ideas:

Ready to Launch:

Now that you've planned your campaign, it's time to put your plan in action. Be sure to check in on step 8 once your campaign is a wrap. Good luck!

Step 8 | What's Next

Congratulations! You've just wrapped up your social campaign. Now comes the fun part: distilling your learnings into a simple takeaway that can be shared across your organization and used to inform future campaigns. Get together with your team to discuss the campaign using these prompts:

- ☐ Copy your campaign goal from page 3 of this checklist.

- ☐ What were the actual results? Did you meet your goal?

- ☐ Did this project stay within scope (timeline, budget, etc.)?

- ☐ What messaging resonated, which tactics worked (or didn't), and what can you do better next time?

- [ ] What were the top performing pieces of content? And the worst performing pieces?

- [ ] Provide a few examples of audience response/engagement (both good and bad). Summarize the overall reception of the campaign.

- [ ] Which internal processes worked really well? Which failed?

- [ ] Identify areas to improve your planning process for future campaigns.

Pop Some Champagne:

The final step is to celebrate your success. Take these learnings and put them in an easy-to-present format to send to your stakeholders. Don't forget to archive this so you can easily reference it the next time you plan a social campaign.

That's a Wrap!

The Spredfast social marketing platform changes how you connect with the people your business cares about most, leveraging the power of social to help you build your brand—and brand loyalty. Be brave with your social strategy and the conversations you join, be smart with the data you unearth and utilize, and be relevant with the stories we'll inspire you to create.

Spredfast®

Want to Learn More?

Visit us at **spredfast.com** or email us at **questions@spredfast.com**