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DEVELOPING A SOCIAL MEDIA STRATEGY
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WHAT DOES A SOCIAL MEDIA STRATEGY ENTAIL?

What kind of **tools** and **approaches** are most effective for engaging your audience?

What type of **resources** are needed to support the implementation of a social media strategy in practice?

This webinar will:

- Answer these questions;
- Provide a basic outline of the key components of a social media strategy, and;
- Highlight the resources and tools that can support your strategy.
strategy |ˈstrætədʒi| noun ( pl. -gies)
a plan of action or policy designed to achieve
a major or overall aim: time to develop a
coherent economic strategy | shifts in
marketing strategy.
the art of planning and directing overall
military operations and movements in a war
or battle. Often contrasted with tactics (see
tactic).

Strategy is a word commonly used in
describing health communications planning
and programs. When using social media,
strategy takes on new meaning because, at
its core, social media is about engaging the
audience in a relationship that extends
beyond simple transmission of information: It
is about knowledge exchange and co-creation
of content, not just the dissemination and
translation of information.

Social media emphasizes relationships, co-
creation of knowledge, and rapid response. It
refers to an interactive media content that
derives its value from user participation. In
health communication terms, it means
engagement with an audience beyond simple
delivery of content, towards engaging that
audience in a conversation. This means
developing a strategy for initiating and
sustaining the conversations that align with
your public health goals and support your
advocacy efforts.

The first question to consider in your strategy is:

What is your goal?

In social media terms it is easy to lead with
the technology and not with your own goals
and objectives. As a result, the first
component to developing your strategy is to
determine what your goals are. The strategy
serves the goal, not the other way around.

Is social media right for you? If you are
looking to distribute content in novel ways,
social media tools can help, but a social
media strategy is not necessary (you can
refer to the social media guide for examples
of tools). Social media is more than a
distribution channel. Rather, it blends
conversation with traditional broadcasting
methods of pushing content to an audience.
Using tools like Facebook or YouTube to
solely distribute content is different than using
these tools and the content delivered through
them to seed or continue a conversation. It is
this latter part that requires a social media
strategy.
Engaging multiple agents (individuals and organizations) in conversation transforms the health communication encounter from being simple or even complicated to the realm of the complex.

With simple situations, there are relatively few components involved and it is possible to produce a consistent, predictable outcome each time a strategy is executed. This is the realm of best practice.

Complicated systems, ones with many parts that are organized in an ordered way, have more variability within them that prevents predicting outcomes with great accuracy, yet it is possible to implement a strategy that creates reasonably consistent outcomes each time it is delivered.

Complex systems are those with much diversity in the interacting parts and little certainty about the outcomes in advance. At best, conditions can be set that help anticipate particular activities, but the outcomes cannot be predicted.

Complex systems often have the following qualities:

**Non-linear:** Change doesn’t always happen in predictable ways and “movement” can be in any direction at any time.

**Emergent:** Interaction between diversity produces new patterns – ideas, knowledge, structures – that cannot be predicted ahead of time and are highly context dependent.

**Dynamic:** Change is continuous throughout and often exists at different rates at different times.

**Adaptive:** Agents within the system adapt to feedback gained within the system.

**Uncertainty:** The outcomes of any interaction can at best be anticipated, but never fully predicted due to the changing nature of the system.

**Co-evolutionary:** Interactivity produces new patterns and structures that can work together to change the entire system.

Social media exhibits most of these qualities most of the time when observed in everyday use and interaction. From the perspective of strategy development and evaluation, it is important to be aware of these qualities when designing data collection strategies and interpreting the findings.
The dynamic, interconnected environment that social media creates requires a strategy that works with this complexity rather than against it. Building on the previous concepts from complexity science, here are ways to work with complex adaptive systems productively in developing a strategy for social media use:

**Non-linearity:** Conversations are unpredictable. They jump around and don’t often follow a path that can be predicted, controlled or managed. In health communications with social media, the practitioner’s role is to support conversation, provide probes for discussion and explore opportunities in divergent strains of thought in a conversation thread to introduce ideas or provide information.

**Emergence:** As conversations unfold, new ideas and thoughts come out. This provides an opportunity to understand what is most important to your audience and serve as a place for innovation and learning. In social media, it is important to be mindful that your audience will tell you what is most important by what they gravitate to, not the other way around.

**Dynamism:** Conversation flow will change, ebb and flow as new ideas are presented and different users engage. Just as the conversation develops, so too does the approach to engaging the audience. Strategy must be adjusted continually to reflect these changes.

**Adaptation:** Rather than “ready, aim, fire”, social media uses a strategy that is more “ready, fire, aim”. By paying attention to what your audience is interested in and adapting the strategy to suit this (or redirecting them back to a path more comfortable for your organization if that is appropriate), an adaptive social media strategy allows practitioners to maintain and grow relationships.

**Uncertainty:** The constant change in social media tools and conversation means that you can’t fully know what will come from any conversation. Health practitioners using social media to its fullest need to accept and embrace this.

**Co-evolution:** As parts of the strategy unfold, new patterns emerge and may mesh with existing structures that evolve together. As you shape social media conversations, it may shape your organization.
POINTS OF ENGAGEMENT IN YOUR CAMPAIGN

Social media campaigns have some similarity to the manner in which eHealth tools can be used to support behaviour change. Norman (2007) describes three orders of eHealth interventions, which apply here:

**First Order  Stand alone**
A First Order strategy relies on social media messages as the sole-source of engagement with your audience. The strategy may be aligned with other activities, but its execution is independent of other activities being conducted. This could include Facebook contests, Tweet-ups, or YouTube video contests.

**Second Order  Complementary**
A Second Order strategy uses social media to complement existing activities that are being done as part of a larger campaign. This might mean using Facebook to distribute a link to a new toolkit on your organization’s website or uploading a video of a training that is held at community centre.

**Third Order  Integrated**
A Third Order strategy involves embedding social media into other activities. This could include a tobacco-free rally at city hall, where participants tweet messages to their peers to enlist their support and advocate policy makers. In this case, both the offline or other online media are used in conjunction with social media tools.
There are three main approaches to using social media that can be used in an interconnected manner with each of these orders:

**General information** Using social media to inform the audience of events, activities, and tools.

**Campaigns** Using social media as part of a media advocacy strategy, employing similar tactics such as story build-ups, linking activities together and using social media for message delivery, content generation and building support with a constituency.

**Communities of Practice** For audiences that are already engaged or sub-populations, social media can provide a means of organizing and supporting the activities of groups. This can include Facebook groups or blog-rolls that allow groups of individuals or organizations to share ideas and stay connected while both sharing existing knowledge and generating new knowledge.

Your strategy will depend in part upon which of the three orders you wish to employ. It will also depend on your answers to these questions:

- Do you have field workers?
- Will those field workers be delivering some or all of the content for the program?
- Is this content different, the same, or complementary to that being generated online?
- Can your participants engage directly or does this have to be through an intermediary?
- Do you have the time, interest and response capacity to monitor activity on your social media feeds?
- Is there much coordination between different components of your programs?
- What is your risk tolerance?
Tactics represent the “how” of the strategy and often the “what” of the strategy. Questions that should drive your tactics include:

- Speed of information (does this rely on rapid updating?)
- Complexity of the message (can this be broken down into 140 characters meaningfully?)
- Type of media (Text? Video? Audio? Mixed?)
- Who is creating the content? (You? Them? Everyone?)
- Type of content (Are you relying on evidence, anecdote or conversation?)

tactic |ˈtaktik| noun
an action or strategy carefully planned to achieve a specific end.

( tactics) [also treated as sing.] the art of disposing armed forces in order of battle and of organizing operations, esp. during contact with an enemy. Often contrasted with strategy.

TACTICS AND SOCIAL CONVENTIONS

- **Empathize with your audience** Why would anyone follow you / friend you / watch your material? Make sure your content is up to good standards.
- **People friend people, not organizations** Even if you have a corporate interface, people seek to engage other human beings. Zappos shoes and Dell Computers are two corporate examples of ways to engage people from a corporate position. Humour is an effective way to draw attention, but it poses a risk if misinterpreted by the audience and should be used carefully and strategically.
- **Make it easy to engage** Placing buttons to link your content to the posts of others is a way to enable your audience to promote your materials.
- **Create a story** One of the most effective means of promoting content is to create a storyline that encourages people to get engaged with the material. A story also means continuity. In terms of blogging, posting with some form of consistency in the way the narrative is structured helps. This doesn’t mean predictable, but it does mean consistent.
- **Generosity is the key** The more you give, the more you get. Tweet, retweet, and retweet some more. Thank people. Give them props. Comment on their blog posts or remark on their videos. Participation in the content generated by others is important in building relationships and credibility.
TOOLS
There are multi-channel tools that can help you build a “listening station” or “dashboard” for your social media activities. Although you can use a lot of different tools, it may be useful to try a consolidator program that allows you to update on multiple services at the same time.

Tweetdeck is more powerful and sophisticated than most multi-channel tools. Its power is also the reason it is the most challenging to use at times. Originally designed for Twitter, Tweetdeck has grown to include Twitter, Facebook, LinkedIn, Google Buzz, MySpace and Foursquare. There is a mechanism to include multiple accounts and update each one of these services at one time, sending the same message to all services or selectively.

Other tools that work in this manner include Seesmic, Brizzly or Socialite (for Mac).

Seesmic is a multi-method platform that includes a web service, downloadable apps for mobiles, and a pc-based software tool.

Brizzly is a completely web-based tool that allows for updating multiple platforms. It is easy to set up and use, however it is only available for the web.

Socialite / Courier is a downloadable program that works only with Mac computers. It is also a simple, elegant interface for social media.

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<th>Tool</th>
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In addition to the technologies themselves, there are some tools beyond those mentioned above that may be useful.
URL Shorteners Example: bit.ly

URL (short for Universal Resource Locator) shorteners are becoming prolific in their use because they allow the conversion of long internet addresses into shorter ones. They convert a very long address or URL into a shorter one. One example is using the U.S. CDC’s link to its eCards campaigns:

http://www.cdc.gov/SocialMedia/Campaigns/H1N1/index.html#eCards

Figure 1 Example of URL shortening using a popular shortener service, bit.ly

1. Copy the URL into the shorten bar.
2. Clicking “Shorten” will produce a small version of the longer link that, if clicked, will point to the original link location on the web.
3. This new link can then be dropped into a Tweet (as illustrated below) or posted on a Facebook page to accommodate the 140-character limits imposed by some services.

Most URL shorteners have an added benefit of collecting response data from the links created. Thus, you can see how many times that new shortened link – which is unique and created only for you – was clicked on and when. This allows the social media team to determine how often links are clicked and how long the link remains in circulation and use. For example, a link may be clicked multiple times in a single day, but not afterward.
ACCESS AND USE
Access to the technologies needed to engage with social media is one of the most important factors in choosing what tools to use and how to deploy them.

The starting place needs to be your workplace. If your organization does not allow access to Facebook, YouTube or other social media sites due to policy, security or firewall restrictions, that will limit your ability to implement a plan. Alternative strategies may include using mobile devices as the platform as they have less vulnerability to the same kind of threats that impact land-line networks. Check with your system administrator and local policies before you develop your strategy.

The next point to consider is the access of your audience. In Ontario, broadband access is available widely, but not in all areas. Wireless voice and data coverage, while accessible to most regions, is inconsistent and fragmented in rural areas. For example, smart phone access is growing rapidly. A smart phone is any mobile device that enables integrated voice and data technologies allowing users to access the Internet from a mobile device. Nearly all of the mobile phones being sold today are smart phones in some capacity. However, while smart phones are ideal tools for reaching those in urban and sub-urban areas, the reach into rural communities is still limited. Nonetheless, reach is still better than using traditional land-line enabled Internet – whether high speed or not.

Rich-media tools like YouTube are problematic for those areas with low-bandwidth or relying on wireless (mobile) networks, while tools such as Twitter can be easily accessed through text messaging on a regular handheld device. Most other tools fall in between in their accessibility.
STAFFING, TIME AND TIMING
One of the critical issues for social media is not technological resources, but human resources. Social media tools are often very simple technologies, however it is the conversation that makes it effective. That is a staff capacity issue.

One of the issues that impedes social media use is that the delivery of content is much more difficult to decouple from content creation. In traditional campaigns, a health communications team might work with content experts to craft messages and test them out. This is much more problematic in social media environments where it becomes difficult to engage your audience through an intermediary like a communications office. Thus, content providers also need to serve as communicators, which may challenge the existing structure in an organization, but also require changing roles and expectations.

This shift requires closer collaboration between the communications leaders and the content creators – making both groups work much more closely with one another.

Another issue is with regards to the time and timing of social media messages. On spaces like Facebook and Twitter, conversation happens very quickly and at times these conversations are difficult to keep track of. Using a social media dashboard can help, but familiarity and confidence with the medium is required for optimal use.

Social media needs to be managed by a focused person or persons and should not be left to casual engagement. The principal reason is that, left unattended, social media conversations can blossom in directions that are less useful and, in some cases, harmful. In staffing a social media strategy, consider the following:

• A single social media leader is necessary to ensure that messages have some consistency, to monitor trends, and to assist in evaluation. The amount of time that should be dedicated to this role is dependent on the size of the organization, the goals of the strategy, and the level of engagement sought through the campaign. It is not unreasonable to expect that someone in this position devote at least 2 hours per day to social media development, participation, monitoring, and evaluation.
A team-approach to social media content has many advantages, including providing additional coverage and support for a social media leader. On the Youth Voices Research Groups’ Food4Health project, all team members were expected to generate at least 5 content contributions to any of the project’s social media streams. This helped generate a lot of content, created opportunities for different voices to come together to promote the project and communicate messages, and reduced the pressure for one person to generate all of the content. It also enables a broader range of times for content and message delivery.

The spacing and timing of messages is important. A problem with having set times allocated for social media is that long bursts of content flood the network followed by little activity, making for an awkward conversation. Tools like Xefer allow social media teams to monitor when tweets take place and what time those messages are re-tweeted (see example on page 15). With every clustered set of messages comes the risk that people might tune out the messages or stop following your feed due to information overload.

This can be addressed by:

a. Checking in to social media more frequently, for shorter periods of time. Having tools on mobile devices and computers can help with this.

b. Use a service such as Co-Tweet (see example on page 15) to program particular parts of a message for distribution at different times. Many services allow you to program the time for when a message is sent out, holding it in virtual storage until the appropriate launch time, which could be any time of day or week.

c. Involving multiple people in the content development and distribution. This includes your audience! For the Youth4Health initiative run by the Youth Voices Research Group, young adults were enlisted as social media partners and asked to tweet, blog, and post content as part of a social media strategy over and above their personal contributions to the community of discussion.
CASE EXAMPLE 1: ParticipACTION

The revised and revitalized ParticipACTION has embraced social media as part of its strategy for promoting health and wellbeing using a mix of electronic and physical events to complement its messaging and public engagement strategy.

Figure 2 (see page 17) shows the homepage of ParticipACTION. Visible to the reader are a series of links to information, toolkits, and three buttons that illustrate ways to connect to some of their social media platforms: blog, Facebook and Twitter.

In order to make the program successful, ParticipACTION has tried to make exercise and physical activity fun and personable. To do this they recruited an Active Living Ambassador, Catherine Cameron, to serve as a face and voice for the campaign. Catherine crafts messages that combine evidence, experience, and topical contextual information in a manner that remains consistent in its energy level and focus on healthy, active (and fun) living.

To keep with the emphasis on activity, ParticipACTION has tried to create a message stream that is light-hearted, energetic and creative as a means of modeling its desired outcomes. To this end, Catherine Cameron will submit posts that include her personal examples from skiing, exercise classes or some other fun, active activity that she might be doing with her family. Figure 3 (see page 17) shows one of her blog posts.

ParticipACTION’s Facebook page illustrates how this approach looks in a different form. Figure 4 (see page 18) shows the page and how it has been customized to include links to videos, a discussion board, and links to other pages, taking advantage of Facebook’s newer features. In each of these links, the emphasis is on ways to showcase the information that ParticipACTION is interested in delivering and providing opportunities for visitors to the page to engage with the content and the organization.
CASE EXAMPLE 1: PARTICIPACTION

**Figure 2** Homepage of Participaction

**Figure 3** Blog post by Catherine Cameron

If you’re looking for a full-body workout, look no further. Whether you’re gliding along at a brisk clip or taking the slow and steady approach, XC skiing is one of the best cardiovascular fitness activities around. Like all aerobic workouts, this activity keeps the heart pumping at an elevated rate for an extended period of time, boosts "good" (HDL) cholesterol and helps control blood pressure. It builds endurance, strengthens the spine and can help with weight maintenance or loss. As someone who enjoys cycling and running, I find XC skiing a terrific way to cross train. But there’s even more good news! Cross-country skiing is a great low-impact activity that exercises all major muscle groups, is a great way to relieve stress, and the combination of exercise and fresh air almost guarantees a good night’s sleep.
CASE EXAMPLE 1: PARTICIPACTION

Figure 4 Participaction’s customized Facebook Fan Page
The U.S. Centre’s for Disease Control were among the first large public health agencies to embrace social media. Their social media portal (see Figure 5, page 20) provides a wealth of examples of ways in which social media has been, and is currently being, applied to a wide variety of public health issues.

The CDC strategy involves placing content on multiple platforms simultaneously, including use of multiple sub-brands based on particular salient issues. These include:

- Daily Strength blog and support group page
- Facebook page
- MySpace page
- Flickr page
- YouTube channel
- Podcasts available on iTunes
- @CDCgov: General health and safety information
- @CDCemergency: Emergency preparedness and response information
- @CDCflu: Information on influenza, including H1N1
- @CDC_eHealth: Social media and health communication-related updates

For highly specialized issues where there is intense interest in an emerging or persistent topic, the CDC also creates specialized, focused microblogs on topics like H1N1 and on the recent peanut-related recalls.
CASE EXAMPLE 2: U.S. Centers for Disease Control

Figure 5 Social Media page of U.S. Centers for Disease Control