Social Media Starter Kit

This starter kit offers social media novices guidance in establishing an organizational social media presence. The resource includes a series of tip sheets and templates that provide a basic structure for each element of an integrated social media strategy, including: a starter sheet to help build your online profile, guidelines for creating a social media plan and policy, a worksheet to facilitate an inventory of your existing communications, as well as ideas for measuring your social media efforts. By following the tips and tools included in this starter kit, your social media strategy will be off to a good start.

The tip sheets and templates included are:

- Social Media Starter Sheet
- Social Media Plan Outline
- Social Media Policy Outline
- Communications Inventory Worksheet
- Social Media Measurement Tip Sheet

Download this resource at www.hclinkontario.ca/images/social-media-starter-kit.pdf

Ce document est également disponible en français
Ask: Why?

What do you want or need to do with social media: broadcast information? share information with selected others? hold discussions? listen to what’s being said about a topic? There are many possibilities. Knowing what you want to get from a social media presence will guide your goals and objectives.

Ask: What are similar organizations, partners or others in your circle doing?

Find out what’s already happening in your field. How do you see yourself joining in? What would you do similarly or differently? Feel free to ask other organizations for advice; organizations that excel in social media are social!

Ask: What do you already have?

Unless you are a brand-new organization or program, you will already have communication tools that your social media presence can build upon. Take an inventory of all print and online materials such as your newsletter, website or blog.

**RESOURCE:** HC Link's [Communications Inventory Worksheet](#) provides a template for your inventory.

Some of your existing content may work well in social media platforms. Having multiple outlets for content (perhaps with different audiences) provides an opportunity to resurface older content or to refresh it by adding a new angle. A community story on your website may work well as a blog post, perhaps including an update or giving additional information. That same community story may provide the perfect quote for Twitter or images for photo sharing sites.

However, it is important not to use identical content everywhere. This discourages users from following all your channels of communication. Some information will likely be repeated in several places but each platform should have a unique focus.

Assemble: The basics

Before you set up a social media account on any platform, you will need to pull together some key things such as user name, avatar and bio.

**RESOURCE:** HC Link's [Social Media Starter Sheet](#) helps you organize the information you need.
Social media plan

A social media plan describes what you are going to do and how you are going to do it. It should align with your organization’s strategic and communications plans.

Some plans may be highly detailed, step-by-step action plans for each social media platform, while other plans are less structured. Tailor the following basic components to create a plan that fits your organization’s culture and needs:

- **Resources** - What staff, time and funds do you have available?
- **Goals** - How can social media contribute to your organization’s mission?
- **SMART Objectives** - What Specific, Measurable, Attainable, Relevant, Time-sensitive achievements are you seeking?
- **Audiences** - Who are you trying to reach?
- **Messages** - What are your key messages?
- **Strategies** - What do you need to do to achieve your objectives?
- **Content** - Where will your content come from?
- **Evaluation** - What are you using to measure the growth and success of your social media activities?

**RESOURCE:** See HC Link’s Social Media Plan Outline for a more detailed description of these components.

Social media policy

A social media policy allows an organization’s staff to participate confidently in social media. The policy can be quite brief; most statements required will likely already exist within your personnel policies. Generally, it should contain a statement of purpose, outline guiding principles about what to do, provide sample disclaimers (if staff are required to use them in their social media posts) and specify repercussions for violations. It is important to keep the focus on things people can do rather than making your policy a detailed list of prohibitions.

**RESOURCE:** HC Link’s Social Media Policy Outline goes into more depth about these policy components.
Measurement & Evaluation

It is important to measure the growth and success of your social media activities and the degree to which your results have met your social media plan’s goals and objectives. Use any data you can to tweak and improve your efforts and adjust your plan. If something isn’t working, try something else in its place. Consider including social media questions in any regular surveys you conduct.

RESOURCE: HC Link’s [Social Media Measurement Tip Sheet](#) provides guidance on how to measure social media activities.

When Things Go Wrong

At some point, something will go wrong. Everyone makes mistakes! Do not ignore, deny or panic about the problem. Being the first to respond to your own mistakes will give you an advantage, allowing you to correct the error or apologize sincerely and gracefully.

If appropriate, use mild and/or self-deprecating humour to help defuse the situation. Always thank people for their feedback and respond with respect.
We hope you find this social media starter kit helpful in establishing your organization’s social media presence. In closing, here are a few social media pointers to consider along the way:

Social Media Pointers

Be there, Do it

- Social media is an exciting, ever-changing field with a culture of sharing and support. Jump in! Don’t be overly cautious.

Be consistent

- Don’t tweet excessively for a week and disappear for a month.
- If using multiple tweeters, consider using the ^ symbol followed by the tweet author’s initials. Example for post by Jane Doe: Had a great session at the #OCDPAseries today! ^JD.
- Explore social media management tools, such as Hootsuite or Tweetdeck, that facilitate sharing across multiple platforms.

Be professional

- If you hesitate before posting, don’t post, or refer to a colleague or manager.
- Remember that you are representing your organization.
- Acknowledge mistakes — apologize and move on.

Share and support

- Connect and build relationships with like-minded people and organizations.
- Engage with followers: start conversations, ask questions, encourage comments.
- Attribute repasted content: Insightful article on social determinants of health in Ontario www.hclinkontario.ca (via @Health_Nexus).
- Comment on other posts to build/reinforce community: Thanks for sharing! RT @OntarioHHC Watch the latest webinar from @HC_Link.

Look twice, Send once

- Try to avoid typos.
- Input your link or attachment, type your content and then put in the address or account from which you will send the message.
**Websites**

Beth’s Blog: [www.bethkanter.org](http://www.bethkanter.org) *(follow her many social media channels to stay in the know)*

Blogging Best Practices: [www.echoditto.com/blogging](http://www.echoditto.com/blogging)


SocialBrite: [www.socialbrite.org](http://www.socialbrite.org)

Social Media Examiner: [www.socialmediaexaminer.com](http://www.socialmediaexaminer.com)

**Documents & Tool Kits**


Social Media at CDC: [www.cdc.gov/socialmedia/](http://www.cdc.gov/socialmedia/) *(In particular, see Media Toolkit, Writing for Social Media under Guidance Tools)*


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**HC Link Your resource for healthy communities**

HC Link works with community groups, organizations, and partnerships to build healthy, vibrant communities across Ontario. We offer consultations, learning and networking events, and resources in both English and French. Our services are funded by the Government of Ontario and are provided free of charge where possible.

To learn more about us or request a service, contact us at:

[www.HCLinkOntario.ca](http://www.HCLinkOntario.ca) | info@hclinkontario.ca
416-847-1575 | 1-855-847-1575

This document has been prepared with funds provided by the Government of Ontario. The information herein reflects the views of the authors and is not officially endorsed by the Government of Ontario.
Social Media Starter Sheet

**Note:** Consider your organization’s branding guidelines when developing/selecting logo, background/header images and descriptive text.

<table>
<thead>
<tr>
<th>USER NAME OR HANDLE</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>▶ Try to be consistent and use the same username across multiple platforms</td>
<td></td>
</tr>
<tr>
<td>▶ Search the social media platform to make sure your desired handle (username) is available</td>
<td></td>
</tr>
<tr>
<td>▶ Username checking sites allow you to check several platforms at once (<a href="http://checkusernames.com/">http://checkusernames.com/</a> or <a href="http://knowem.com">http://knowem.com</a>)</td>
<td></td>
</tr>
<tr>
<td>▶ Abbreviations, acronyms and underscores can be useful</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>BRIEF BIO</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>▶ Be concise and to the point</td>
<td></td>
</tr>
<tr>
<td>▶ Should be easily scannable on screen</td>
<td></td>
</tr>
<tr>
<td>▶ Include organizational priorities or key words - i.e., health promotion or healthy communities</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>AVATAR OR IMAGE TO IDENTIFY THE ORGANIZATION</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>▶ An organization’s logo (or variation of it) is commonly used</td>
<td></td>
</tr>
<tr>
<td>▶ Note that most social media logos are square shaped</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LINKS TO YOUR WEBSITE, BLOG OR OTHER ONLINE CHANNELS</th>
<th></th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>BANNER/HEADER IMAGE</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>▶ The header image ideally complements your logo and other branding elements</td>
<td></td>
</tr>
<tr>
<td>▶ Taglines, staff photos or recent event images are popular</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>KEYWORDS</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>▶ Careful selection of keywords that reflect your various interest areas will assist others in finding you and increase your like-minded connections</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>GROW YOUR NETWORK</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>▶ Search for field experts, thought leaders and relevant news outlets</td>
<td></td>
</tr>
<tr>
<td>▶ Copy followers or friends as relevant</td>
<td></td>
</tr>
</tbody>
</table>

Download the complete Social Media Starter Kit

Visit HC Link at
[www.hclinkontario.ca](http://www.hclinkontario.ca)
Social Media Plan Outline

This outline presents basic components of a social media plan that you can customize to best suit your organization.

**Resources**

**Staff**
- Establish minimum commitment and content contribution (maintaining a consistency in posting/sharing)
- Assign social media contributors

**Time**
- A minimum of five hours a week is needed to maintain a presence

**Funds**
- Some applications that make content sharing more efficient require paid subscriptions

**Goals**
- Ensure that the social media goals tie back to your organization’s strategic plan
- The social media plan should complement your organization’s communications plan

**Objectives**
- Check that the plan’s objectives are SMART: Specific, Measurable, Attainable, Relevant and Time-sensitive
- See examples from Beth Kanter (http://www.bethkanter.org/25-smart/)

**Audiences**
- To whom are you speaking?
- This can be a list of several audiences, such as: government bodies, investors, board members, supporters, clients (future, present and past)
- If necessary, assign audiences to appropriate social media platforms
Social Media Plan Outline

Messages

- What are your key messages?
- How will you tailor them to speak to each specific audience?

Strategies

- Outline specific ways in which the objectives can be achieved
- Select your social media platforms and their measurement tools
- If using and or integrating several platforms, consider using a management tool such as Hootsuite or Tweetdeck

Content

- From where are you drawing most of your content?
  - Refer to your communications inventory!
  - Also consider: current news, information shared by outside organizations and individuals
- Is your content available online? Post documents/information online first or link to a summary or abstract
- Ensure that content on social media and your website are linked to one another to lead people to your various social media accounts and content (i.e. embed share buttons, post your social media accounts on your homepage, link your YouTube channel to your website and social media accounts)

Evaluation

- What are you using to measure the growth and success of your social media activities?
- How can you include social media questions in your regular surveys?
- How often do you review collected data?
- How do your first-year results line up with your social media plan goal and objectives?
- Revisions to your plan are encouraged as you move forward in social media
- If it’s not working, scrap it (smart fail)
The following components should be considered for inclusion in an organization’s social media policy:

**Policy statement**

This is an outline of the policy’s purpose, referencing the organization’s usual professional and ethical standards.

**Guiding principles**

These are the basic dos and don’ts of your social media policy. Focus on the things people CAN do rather than making this a detailed list of prohibitions. Recommended general principles include:

<table>
<thead>
<tr>
<th><strong>DO</strong></th>
<th><strong>DON’T</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>‣ Be honest</td>
<td>‣ Tell secrets</td>
</tr>
<tr>
<td>‣ Be yourself: it’s OK to have a personality</td>
<td>‣ Pretend to be someone else</td>
</tr>
<tr>
<td>‣ Be polite</td>
<td>‣ Spam</td>
</tr>
<tr>
<td>‣ Write what you know</td>
<td>‣ Pick fights</td>
</tr>
<tr>
<td>‣ Be clear: it’s easy to be misunderstood</td>
<td>‣ Protect your privacy and that of your organization, partners, supplier and clients (respect <strong>PIPEDA</strong>).</td>
</tr>
<tr>
<td>‣ Add value to your content (comment, summarize, expand, point to other references, etc.)</td>
<td>‣ Respect your audience, your organization and your colleagues</td>
</tr>
<tr>
<td>‣ Have conversations</td>
<td>‣ Attribute content to its original author or source</td>
</tr>
<tr>
<td>‣ Respect copyright laws</td>
<td>‣ Make sure what you share is factually correct</td>
</tr>
</tbody>
</table>

**Social Media Policy Outline**
Handling controversy

Providing guidelines for staff to help deal with challenging commentary or feedback will help them make the most of the situation. Always view negative comments as an opportunity. Guidelines could include:

<table>
<thead>
<tr>
<th>DO</th>
<th>DON’T</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acknowledge the issue — be the first to respond to your own mistakes</td>
<td>Fail to respond</td>
</tr>
<tr>
<td>Thank people for their feedback and respond with respect</td>
<td>Ignore, deny, or panic about the problem</td>
</tr>
<tr>
<td>Apologize sincerely and gracefully</td>
<td>Overreact when mistakes are made – mistakes happen</td>
</tr>
<tr>
<td>Use mild and/or self-deprecating humour, if appropriate</td>
<td></td>
</tr>
<tr>
<td>Fix the problem</td>
<td>Get into pointless arguments</td>
</tr>
</tbody>
</table>

Disclaimers

If you would like employees using social media to include a disclaimer about their personal posts not necessarily reflecting the opinions of the organization, outline when and how in this section. Offer sample text to make it easy for employees to comply.

Enforcement

Outline repercussions for policy violations. This section can be quite short as it probably only needs to reference your main personnel policy.
## Communications Inventory Worksheet

<table>
<thead>
<tr>
<th>COMMUNICATION PIECE</th>
<th>AUDIENCE</th>
<th>FREQUENCY</th>
<th>LANGUAGE</th>
<th>RESPONSIBILITY</th>
<th>METRICS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ONLINE</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Examples</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Blog</td>
<td>‣ Anyone who gets sent there via a Google search. &lt;br&gt; ‣ Clients familiar with our organization or wanting to be. &lt;br&gt; ‣ Those who subscribe to blog feed.</td>
<td>Weekly</td>
<td>English and French</td>
<td>Bob, Sally and Sue</td>
<td>Google Analytics</td>
</tr>
<tr>
<td>Twitter</td>
<td>‣ Anyone on Twitter or running general internet searches</td>
<td>Daily</td>
<td>English only</td>
<td>Sally and Sue</td>
<td>Hootsuite</td>
</tr>
<tr>
<td></td>
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<tr>
<td><strong>PRINT</strong></td>
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<tr>
<td>Examples</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Monthly Newsletter</td>
<td>‣ Our key stakeholders. &lt;br&gt; ‣ Those accessing it on our website.</td>
<td>Monthly</td>
<td>Bilingual</td>
<td>Patrice</td>
<td>Opentracker</td>
</tr>
</tbody>
</table>
How do you know if your social media platforms and strategies are furthering your organizational goals?

Ensuring that your social media plan includes some basic measurable indicators is key in having a plan that can be adjusted to best serve your organization and its objectives.

**What do you measure?**

Go back to your social media plan. What were your objectives and strategies? What data demonstrates the results of these strategies?

Focus on the data that tells you something. Are you looking for:

- Action? (i.e. sign a petition, attend an event)
- Information sharing? (i.e. news or research)
- Donors/members? (i.e. recruit more subscribers, donors or members)

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**EXAMPLE:**

**Goal:** To increase the visibility of the organization

**Objective #1:** Use social media and new technology to increase the number of newsletter subscribers 20% within the next year

**Strategies:**

- promote the newsletter on social media networks (a, b, c...) with X frequency
- share newsletter content on networks
- facilitate subscription to the newsletter at conferences and other in-person events with a QR code

**Indicators:**

Number of recorded visits to your subscription page from Twitter, Facebook, LinkedIn...
Other common indicators include:
Retweets, comments, followers, replies, mentions, likes, impressions (LinkedIn), subscribers, hits, downloads, geographic reach, page views and unique visitors.

There’s more than just numbers
Don't forget to track stories and successes on social media that aren’t seen in the numbers. Meaningful interaction with supporters is just as important as likes and retweets.

How do you measure?
Most social media platforms include their own internal data. Alternatively, there exist a number of free and paid platforms that can track more detailed information from more than one source. Google Analytics is one good tool to start with.

(Note: Your webmaster may already have a Google Analytics account set up for your organization’s website.)

Some things that you can learn with Google Analytics:
- How many people visited a certain webpage from Twitter, LinkedIn or an email newsletter
- Traffic sources to your website (including referrals from other organizations)
- The geographic reach of those who engage with your social media and website
- How long visitors stay on your website and view its content
- The number of new visitors your website or blog is receiving
- The pages on your website or blog that are most popular/viewed

Metrics tools that are embedded in social media applications or that are included in social media content management systems such as Hootsuite and Tweetdeck can reveal very helpful information that will allow you to track the success of various communications activities.

It is recommended to gather the data from all sources in one document to make it easier to see the relationships between your data.

See the table to the right for an example.
Analysis

You have the data, now what?
Depending on your strategies, you may want to track data according to a specific timeline. Set up a schedule to track the numbers (it is recommended that data be collected monthly) but also make time to review it. In the first year you may want to review the data quarterly, to search for trends and compare your progress to your goals, and then only bi-annually in the second year.

Review your data alongside your social media plan objectives. Were the objectives met? If not, what could be done differently? Use the current review to set new objectives for the upcoming year.

Go back to your plan
If a strategy isn’t giving you the results you expected, go back to your plan and change it!

Share your successes!
Don’t silo your social media efforts in your marketing or communications department. Encourage your whole team to send you content ideas and share fun updates to include staff and turn them into supporters.