

## Social Media Checklist

### 1 - Develop goals for leveraging social media

- Number of Followers – Who are they?
- Number of Contacts – Who are they?
- Desired conversion to Website percentage?
- Desired conversion to sale percentage?
- Branding goals?
- Communication goals?

### 2 - Choose the social media platforms/vendors you want to use (standards you want to set)

- Web-based applications approved (e.g. LinkedIn, Facebook, Twitter)
- Fee based applications
- Possible social media vendors

### 3 - Document an organizational policy for using the tools and the expected outcomes

- Approved applications (from above)
- Personnel responsibilities/goals
- Content restrictions
- Organizational goals
- Organizational voice (what style, or feel is representative)
- Rules for combined personal/business use (e.g. can content be combined on a Facebook page, or Twitter stream)

### 4 - Train your teams on using approved applications FULLY

- How is training done?
- Who does the training?
- How is proficiency measured?

### 5 - Develop a method and set of analytics for measuring success

- What do we need to measure to assure we are meeting goals?
- What do we need to measure to assure progress?
- How do we gather the analytics?
- Who owns gathering the analytics?

### 6 - Review progress monthly and publish to the entire team in a dashboard formates

- Who is responsible for overseeing social media progress?
- Who owns publishing the analytics?
- What anecdotal stories can be shared?

### 7 - Assign someone to be the R&D person and continually upgrade the tools/platforms in use

- Who has the responsibility for studying new tools?
- How are new tools judged as good or bad and eventually approved or not?
- Is there a budget for tools that have cost?
- How is information on new tools disseminated?