

# Episode 6 Worksheet



## Social Media Guidelines and Policies

This worksheet will help you take action after (or along with) tuning in to Episode 6 of Social Strategy Fundamentals. If you've downloaded our [Fundamentals of Social Media Strategy](#) book, chapter 15 shares more detail about developing guidelines and policies for a successful social media program.

There are five documents we recommend creating for your social media program. Answer the questions and prompts for each topic (perhaps through some discussions with colleagues or your boss) and you'll have drafts of each policy discussed in the episode. Once you create them, share them with your stakeholders and determine a plan for regular reviews and updates.

### Strategic Overview

**Document a written version of your elevator speech; Episodes 1, 2, and 3 can help you answer these questions.**

1. What are 1–3 goals for our social media program?
2. What platforms will we use? Why did we choose them? Who are we trying to reach on each platform? How will we use each one? How does our choice of audience and platform fit with our goals?
3. How will we allocate resources to support the strategy?
4. What does success look like?

5. What key performance indicators are associated with each of our stated goals? How do we gather those metrics? How often do we gather them? What do we report, to whom, and how often?

## Administrative Tasks

**Detail all of the tasks you do on a somewhat regular basis, but not so frequently that they're easy to remember when the time comes to complete them.**

1. Do we archive our social media content calendars? Why or why not? How is it done? How can it be accessed for future reference?
2. What logos do we have trademarked? What are the legal references to our protected trademarks?
3. How do we report trademark infringement online, via both the social media platform and internally?
4. What are our requirements for password complexity? How often do we change our passwords? Do we require two-factor authentication for any of our social media accounts? How do we store shared passwords?

## Content Planning and Publishing

**Create guidelines for creating consistent, on-brand, and accessible content, along with needed approvals.**

1. We will share content that \_\_\_\_ and we won't share content that \_\_\_\_ .
2. Who creates our content? How do we purposefully repurpose content? What should our content framework look like?
3. How do we build a content calendar? How far in advance do we plan our content? Does our content need to be reviewed or approved? How often? By whom?

4. Who publishes content? What tools do they use? Will we schedule content? If yes, how far in advance?
5. What are we doing now to create accessible content? What could we do better? How can we take steps to include it in your process?

## Engagement and Listening

**Document engagement and listening by thinking brass tacks for your strategy; the activities and tasks that day-to-day support goal achievement.**

1. What principles guide our engagement activities on social media?
2. Do we use any content moderation or filtering tools?
3. How do we engage when our community wants to discuss tough issues?
4. If we're listening, what types of mentions or conversations do we want to listen for in social media? Are we using a manual approach or conducting social listening research?

## Crisis Communication

**Record responses to individual and campus crises, including your procedure for responding to them. Create a plan for responding to a campus crisis and include the following information.**

1. How does our campus crisis communications team work with the social media manager?
2. Who is available to help the social media manager in a crisis?
3. Do we have a documented crisis communication plan for social media?