



Module 3 – Smarter Social on a Tiny Budget  
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The Copy Collective*



# Module 3: Smart Social on a Tiny Budget

PART 4 - Planning & Automation



# Planning for success

How to plan your social media, ways to save time through automation and how to tell if it's successful



An aerial, high-angle view of a dense city skyline, likely New York City, with numerous skyscrapers and buildings. The image is in grayscale and has a slightly hazy, atmospheric quality. The text is centered over the middle of the image.

**Finding, creating and posting content onto multiple channels on a daily basis is no easy task. Luckily, there is a multitude of tools out there to help you, especially with the most crucial parts of any consistently successful social media strategy - planning and scheduling.**

# High Level Annual / Monthly Planning

Start with the big-ticket items. What are the significant organisational milestones, events, produce releases, holidays, newsletter blasts, and relevant “Days of the Month” that you will need to post about on social media?

Get ahead of the game and **start planning for them now** so that nothing will surprise you.



# Detailed Weekly Planning

Having a weekly schedule is an **excellent tool for any social media manager**. You can sit down with your colleagues on a Monday morning and plan out the ideas for the week on each social channel.

An even better idea is to have **'content pillars'** for the week – a template for the types of content you will post every day. For example:

- Monday – blog post
- Tuesday – video
- Wednesday – photo album
- Thursday – event promo
- Friday – quote graphic

	A	B	C
1	BLOG POST PLANNING   BLOG POST PLANNING   BLOG		
2		Blog Topic	Author
3	Month 1		
4	1		
5	2		
6	3		
7	4		
8	Month 2		
9	1		
10	2		
11	3		
12	4		
13	Month 3		
14	1		
15	2		
16	3		
17	4		
18	Month 4		
19	1		
20	2		
21	3		
22	4		

A content pillar will help you to be more specific in your planning and will allow you to build up libraries of content.

It will also help you to decide how frequently to post on each channel and at what time of day, ensuring a consistent presence on all channels.

Use an Excel spreadsheet, Google Calendar or Word doc for planning – it doesn't require anything complex as long as it works for your team and everyone is able to use and understand it.

Alternatively, you can use our handy **Blog post planning template** (pictured above) which is part of the downloadable assets with this module.

Check out the explainer video here: <https://vimeo.com/248387882/a5b038dcf7>



# How Do I Schedule Posts Ahead of Time?

Being able to post content and schedule it to go out at the desired time is a fantastic organisational tool. Facebook already offers this as part of the service, but Instagram, Twitter and LinkedIn are a little trickier.

Using a **scheduling tool**, or a 'social media platform' will help to get around this, allowing you to quickly post and schedule across all of your channels in one place, often giving you a handy dashboard for quick reference. All of your channels will be in one place rather than you having to go into each channel.

Another benefit is that many of the tools also provide their measurements and analytics so you can check your progress.

# Let's look at a few tools that will help you plan your social media



*Can't play the video? Simply click the image or  
paste this link into your browser:  
<https://vimeo.com/248260965/44a899105b>*



# Buffer

Simple, free and easy to use for those just starting out.

## **Social platforms supported**

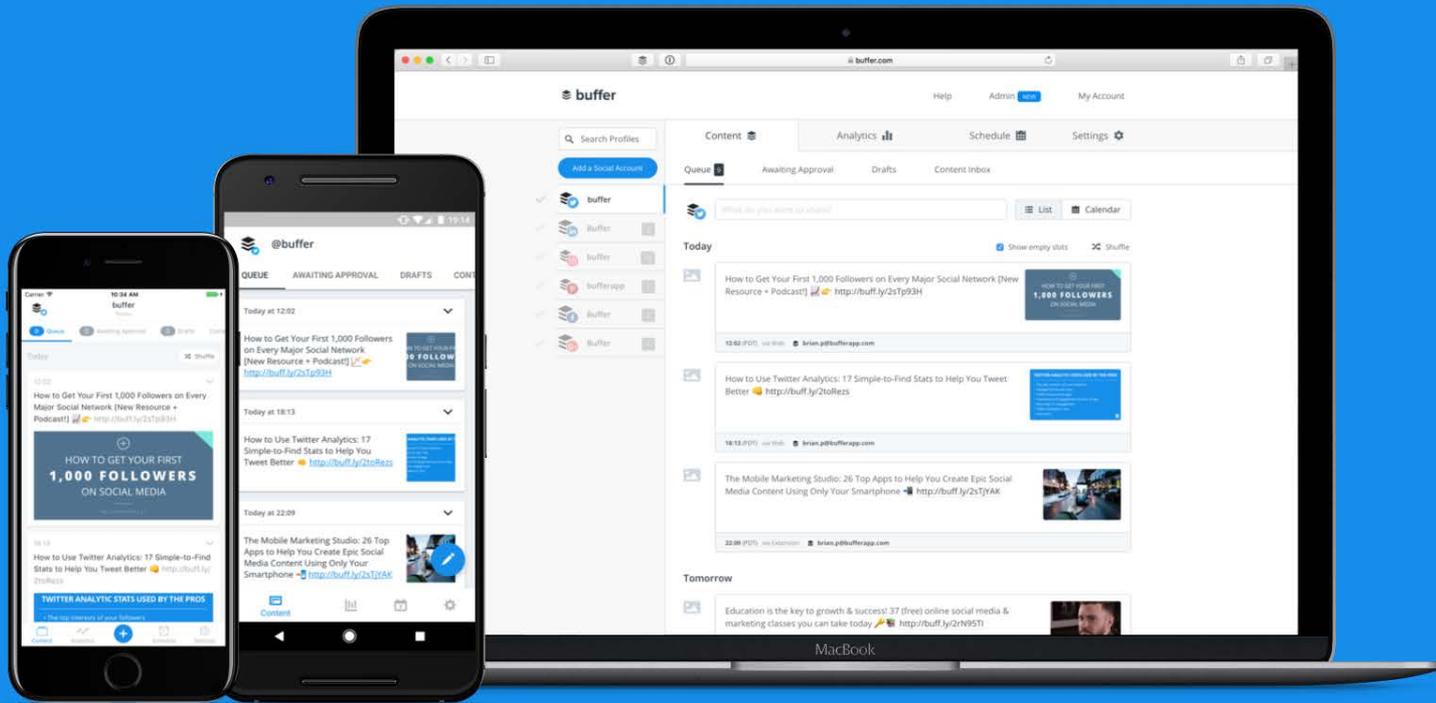
Facebook (profiles, pages, and groups), LinkedIn (profiles, pages, and groups), Pinterest, Twitter, Google+ (profiles and pages), Instagram (for reminders).

## **Features**

You can post across multiple platforms, and it's easy to create your posts. It gives you tips on the best time to schedule. Another useful feature is a tool that let's repost the most popular posts across platforms. The analytics are easy to understand and clear. It sends you reminders when you need to top up your queues.



 **buffer**





# CoSchedule

If you want a no-fuss platform without bells and whistles, then CoSchedule is a great option.

## Social platforms supported

Facebook (profiles, pages, and groups), LinkedIn (profiles, pages, and groups), Pinterest, Twitter, Google+ (profiles and pages), Tumblr, Instagram (for reminders).

## Features

CoSchedule gives you a calendar view with an **easy drag and drop** functionality to change the content across each day. You can quickly post across all social platforms and it's great to use with your team as it has a draft and approve feature. It **integrates** beautifully with your blog post on WordPress and allows you to schedule multiple social posts in the future. It also has excellent **analytics**, and you can see which posts and blog posts rate well with your audience. You need to pay a monthly fee – but you can check out the 30-day free trial to decide if you like it.

## See Your Entire Marketing Schedule At A Glance

Create a unified workflow for every project with CoSchedule's drag + drop calendar. Sync your teams inside a collaborative, cross-functional calendar for social, content, email, events, and more.





# Hootsuite

Hootsuite is more complicated than the other platforms mentioned, but it does have a good range of easy tools and options to help grow your presence.

## **Social platforms supported**

Facebook (profiles, pages, and groups), LinkedIn (profiles, pages, and groups), Pinterest, Twitter, Google+ (profiles and pages), YouTube, Instagram (for reminders).

## **Features**

Hootsuite allows you to post across platforms, but now you can also search and **'listen'** for external posts that talk about your business or topics you are interested in. You can have columns open so you can be actively monitoring your channels at any time. The free option is excellent, with a paid option with more features: e.g. you can use it for teams, go into more detailed lead generation etc.

## CONTENT CURATION

### Manage social content with ease

Stay on message with pre-approved content your teams can post, stored in your favorite cloud file service. Tagging, searching, and usage stats make curating content a breeze.

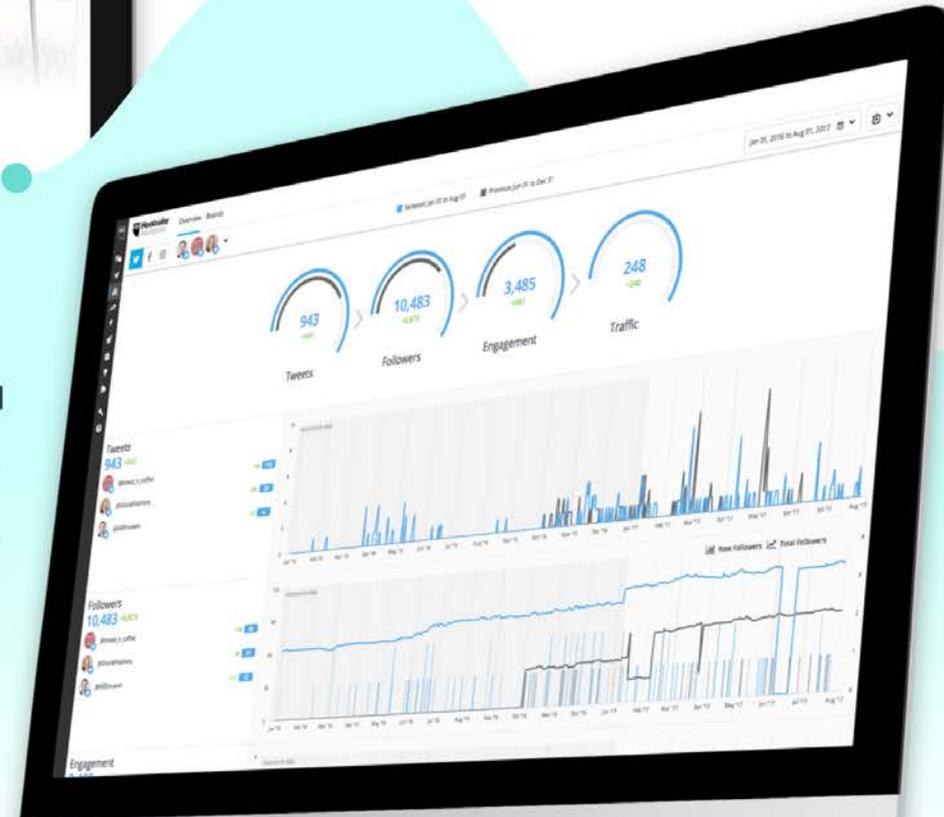
[Learn More about Content Curation](#)

## SOCIAL ANALYTICS

### Track and prove social ROI

Measure the impact of your social media campaigns through comprehensive reporting. Measure conversions by social channel and separate ROI between owned and paid media.

[Learn More about Analytics](#)





# **Analytics and Measurement**

There is no hard and fast rule when it comes to measuring the success of social media. If you asked your manager what it is they would like to see, you might get answers like 'more followers', 'increased brand awareness' or 'more audience engagement'. But which of these is a meaningful measurement and what is the best way to present this information back to your organisation?



## *How do I analyse my social media channels?*

There is no perfect way to measure progress on social media. The best thing to do is to pick one method of measurement and stay with it to provide consistent monitoring.

### **Analytics**

Take a look at what analytics your social channels provide. Facebook, Twitter, Instagram and LinkedIn all have excellent analytics on which to track your progress. If you're using one of the social media platforms already mentioned, you can take your measurements from there. Some of them also create reports for you, so you can present your data in a **visually attractive** way and save time.

*What am I measuring?*

Analytics is just data until you know how to **interpret** it. As a team, you have to decide what social media success looks like for you, to know how to measure it.

*'We want more followers'*

One of the easy answers is to say an increase in the number of followers on each platform. While this sounds sensible and does, indeed, go some way towards brand awareness, a much better indication of success is '**engagement**'.

*What is engagement?*

How many 'likes, shares and comments' your post gets; how much people enjoy your content or how useful they find it.

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## Followers vs engagement

Ideally, you want your followers to increase along with your engagement. Many organisations are tempted to get more followers by spending a lot of money on advertising, but if those people aren't engaging with your content, then it's a pointless exercise. The best content to advertise with is the **content that has already proven popular** with your current audience.

For NFPs therefore, the best measurement for gauging success is 'engagement' – how interactive is your social media community and how much deeper is your relationship with them?

Measure your likes, comments and shares across your social media platforms and set weekly, monthly or annual goals or KPIs (Key Performance Indicators). You can use these numbers from the analytics data in each of your channels. For example, for Facebook, the tab you are looking for is 'Insights'.





*If you're unable to play the video, simply click the image or paste this link into your browser: <https://vimeo.com/248260977/d8924c31b2>*

## **Engagement as a percentage**

To track the percentage of engagement in your audience, a useful equation is:

$$\text{Likes+Comments+shares/reach} \times 100$$

Reach refers to the number of people who have potentially seen your post.

You can use this equation to track how engaging your content is over any time period – for example you can work it out per post, per week or per month.

## **Measuring campaign success**

If you have specific campaigns on social media, then you have some obvious ways of measuring success.

## **ROI**

For ad campaigns that click through directly to a product, you can measure on revenue generation or Return on Investment (ROI). How many people took up your offer based on what you spent? Did five people take it up and you spent \$100? That's a 5% conversion rate – which is pretty good.

As a rule of thumb, if you have to spend three times more than the conversions, you should stop and try something else. e.g. You're aiming to pay \$5 per click, so if your spend gets to \$15 for an ad before you get one click from it, then turn it off and try something different.

## **Leads**

Another social media campaign is to collect email addresses to add to your database. For example, you can offer an educational booklet to download in exchange for their email address. In which case the success of the campaign will depend on the number of email addresses you've collected.

# Exercise

1. Start with your planning tool – Evernote or Trello
2. Find a social media management tool
3. Create an annual and weekly content calendar template – fill it in (or download ours)
4. Get content creating – what extra resources do you need?
5. Get your team involved with scanning for content
6. Set up analytics
7. Decide on the measurement you are reporting weekly/monthly/quarterly/annually

# How to be smart about your social media

- **Policy:** Have a strict Social Media policy for employees or contractors.
- **Staffing:** Be mindful of the security risks to your organisation's online presence and who is responsible for your social media postings, responses etc. Allocate more than one Admin/Editor to your social media accounts. Look to employees to champion your cause.
- **Governance:** Ensure that when an Admin/Editor on Facebook leaves your organisation, they are removed from their roles, and on other platforms passwords are changed.

- **Be active:** Always respond to comments and bear in mind that there are others watching your response. If there is a negative comment it is usually best to respond to that with a request that dialogue continue via email. Should the negative comments continue following this then 'block' but treat each case individually.
- **Consistency:** Ideally have your social media usernames and profile images with logo consistent.
- **Share, share, share:** Ensure all social media 'follow us' buttons are clearly shown on your Website's pages. Further, 'share' social media buttons at the end of news or a blog or pages good to encourage sharing.



# How to be a Social Media Champion

When you as a leader of an organisation and harness the power of social media you will drive more value from your social media strategy because:

- You are not waiting for 'news' to be circulated about your organisation. You post out your own news, and by doing so consistently and effectively your channels become noticed.
- You keep watch on your competitors and peers and see what is latest in your industry, both locally and globally.

- You share the latest news and insights you can easily share to inform, inspire and educate your team and potential customers.
- You show the ‘human side’ of your organisation well via social media posts by telling stories.
- You are connected with a wide audience on social media, are connected with online media influencers and are an influencer in your industry.
- You set the tone and pace for your staff to do the same.



And, therefore, your organisation grows.

Social media is the place where leaders can share their ideas in a more relaxed platform. Posting regularly and even concentrating on one social media network, a leader can drive conversation and encourage debate by sharing their news, interests, views and responses. By sharing their stories, insights, wisdom and experience enables one to lead and show others' pathways.

Social media is also the place where a leader/organisation connects with:

- Potential customers
  - Potential volunteers and employees
  - Can see what competitors are doing, and
  - Can see who they are connecting with.
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# Top Tools for Social Media

There are so many social media management tools and apps out there. Here's a few. However, if you are getting started on social media directly and effectively using a social media platform gives you better understanding, insights and effective engagement.

Your content calendar can be created on Excel, Google Docs or Microsoft Word and doesn't need complex software. It's working with your staff and planning that will give you the advantage.

Plan your events, product releases, holidays, newsletter blasts, relevant 'Days of the Month' i.e. International Day of Volunteers, on a monthly basis is a key aspect of developing a cohesive social media strategy.



Hootsuite

<https://hootsuite.com/>

Social media management platform



Sprout Social

<https://sproutsocial.com/>

Another popular social media management platform



Buffer

<https://buffer.com/>

A simple way to post curated content



HubSpot

<https://www.hubspot.com/>

Automated marketing, free CRM, sophisticated sales tool



Word Swag

<http://wordswag.co/>

Android and iOS app that lets you add words to your photos –great for memes



Canva

<https://www.canva.com/>

One of the simplest, and best, design tools for non-designers. It comes with pre-sized templates for most popular social media channels and posts. Includes photos, and layouts



Google Analytics

<https://analytics.google.com/analytics/web/>

Awesomely powerful – and free – tool for analysing your web traffic and its sources. This is a must have for every organisation



Bitl.y

<https://bitly.com/>

A simple way to shorten, customise and track your links. Free and paid options.



# Questions?

If you have questions about Social Media or the content in these slides, don't hesitate to get in touch with Maureen or Dominique.

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