

SOCIAL MEDIA CAMPAIGN PLANNING GUIDE



PART 1: LIST YOUR OVERARCHING MARKETING GOALS

It's important for your team to understand the overarching goals and how they will influence your Social Media campaign goals.

1. List your Overarching Marketing Goals. Take time to discuss and circle the important marketing goal.

PART 2: ALIGN MARKETING GOAL TO CAMPAIGN GOAL

Now take your most important marketing goal and get specific on what you are looking to accomplish in this Social Media campaign. Fill in the blanks below.

1. We want to accomplish _____ (number) of _____ (lead captures, social media reach, engagement number, etc.) for the duration of the campaign.

2. What social media platforms will you be using for this campaign? We recommend focusing on two main platforms. Pick your two below.

Facebook Instagram LinkedIn Twitter Other: _____

3. Outside of your specific KPI listed above we suggest track a few supporting metrics that measure the support of the Social Media Campaigns. We recommend always taking these benchmarks before any campaign.

Facebook Reach: _____ > Engagement: _____
Instagram Reach: _____ > Engagement: _____
Twitter Reach: _____ > Engagement: _____
LinkedIn Reach: _____ > Engagement: _____
Other Reach: _____ > Engagement: _____

PART 3: TARGET YOUR IDEAL ADVOCATES

Knowing who you're trying to reach is just as important as knowing how to reach them.

1. Build an Ideal Advocate™ basic profile. Circle/fill in the blanks below.

Age: 25-34 35-44 45-54 55-64 Male or Female Social Media: Facebook Instagram LinkedIn Twitter

Interests: _____

PART 4: SETTING A TIMELINE

We recommend keeping to a shorter, specific time frame for campaigns. Think of these as sprints (1 - 2 weeks) in your marketing efforts — that can be executed quickly.

1. Will your event be tied to a Social Media event or awareness month? Maybe around a specific time of the year or holiday? List any relevant dates here.

2. Choose your timeframe.

Campaign launch date: _____ Campaign end date: _____

PART 5: CAMPAIGN CONTENT PLANNING

Here's where we'll plan for content creation and team ownership.

Written Content

of pieces: _____

Owner: _____

Dates: _____

Budget: _____

Ads

of ads: _____

Placement of ads:



Owner: _____

Dates: _____

Budget: _____

Visuals

of image(s) _____

of graphic(s) _____

of video(s) _____

Owner: _____

Dates: _____

Budget: _____

Social Posts

of posts: _____

Owner: _____

Dates: _____

Budget: _____

PART 6: DEPLOY AND MONITOR

As your campaign goes to market we also recommend delegating one person to monitor any responses during the campaign. This will allow your team to understand your target market, how they respond to certain types of content.

PART 7: EVALUATE YOUR CAMPAIGN

When the campaign is complete it's important to evaluate with your team. Here's questions for discussion and to guide your next campaign iteration.

1. Compare final campaign metrics to your benchmarks.

_____ (number) of _____ (email subscribers, clicks to web page, social media shares, etc.)

Facebook Reach: _____ > Engagement: _____
Instagram Reach: _____ > Engagement: _____
Twitter Reach: _____ > Engagement: _____
LinkedIn Reach: _____ > Engagement: _____
Other Reach: _____ > Engagement: _____

2. What piece performed the best overall? Why do we believe these pieces performed well? (Was it creative? Tactic? Timing of the campaign?)

3. What pieces had the lowest performing metrics? What can we deduce from this? (Was our timing aligned with our target's preferences? Is our target truly on this platform? Is our creative strong?)

4. Evaluate time spent vs. output of campaign. Discuss what worked and what didn't for team execution of the campaign. List the team's input here.

CONGRATS! YOU DID IT. HAVE QUESTIONS?

Beginning with this checklist will help you and your team build a game plan for your next campaign. A campaign driven by strategy, team communication and planning. We believe going through this process will guide your team to executing campaigns and help your organization reach your marketing goals.

For more questions on how Social Media Campaigns can help grow your organization, contact the Fervor team at createfervor.com/contact.

Or find us on social [@createfervor](https://twitter.com/createfervor) for the best conversations on marketing made for impact.

