



Created for NEFMA
October 23, 2015

6 Step Social Media Strategy

This is the process we use to work with Fortune 500 clients, colleges, government agencies, non-profits, and small businesses. The only difference is a matter of scale, for creating content and goosing growth with advertising budgets.

1. Setting the Goals

- ✓ New accounts
- ✓ Value of accounts
- ✓ Accounts per household
- ✓ Lead generation
- ✓ Services use (i.e. online billpay)
- ✓ Social media goals are secondary!

2. Finding Your Voice

- ✓ The Golden Circle – owning the “Why” of what you do (StartWithWhy.com)
- ✓ Your Margin Mantra – create a three word filter to focus your content (i.e., ask yourself: “Is this fun, bold, and authentic?” But pick your own brand-friendly words)

3. Identifying Your Audience

- ✓ It’s not about you! Focus on them, and what they need
- ✓ Be where they are, on the platforms they use, not just the ones you like or currently understand
- ✓ Be where they’re going – test out new platforms where you see strong movement
- ✓ Be where you want them to go – send them to landing pages and email lists

4. Creating Your Content

- ✓ Rely on employees
- ✓ Create themes
- ✓ Leverage events
- ✓ Celebrate other people and organizations
- ✓ Google Alerts

5. Using the Tools

- ✓ Scheduling platforms
- ✓ Listening/monitoring tools
- ✓ Automating via IFTTT.com
- ✓ Most businesses don’t get a lot of comments, so it shouldn’t be too time-consuming to respond to all of them, even if it’s just a “Thank you!”
- ✓

6. Taking the Measurements

- ✓ Social media objectives (reach, engagement, views, growth)
- ✓ Business goals (new accounts, value of accounts, products per household, etc.)
- ✓ When all else fails, just ask your clients and prospects what they think and where they saw you
- ✓ Remember: It’s a marathon, not a sprint