

A Social Media/Web 2.0 Plan for ...

(originally from: A Strategic Framework from the Social Tech Training June 22-24 2008, at the MaRS Discovery Centre in Toronto)

Step 1: Convening Your Change Team

The first step in any online strategy process is to get clear on the organization that you work for's big picture goals. Too often technology projects end up as the tail wagging the dog – being tech/feature/design driven - and thus get ignored, misunderstood, or under-supported by senior management. However when tech goals grow directly from an organization's strategic goals, providing clear value to the core work, chances of long-term viability and success increase dramatically.

An important technique often employed in online strategy work is to use a collaborative rather than solo consulting approach. This is important in both understanding all the problems the web is meant to solve, and to glean solutions and useful ideas from different aspects of your organization.

Your online Change Team should be made up of representatives from at least 3 of the following 9 areas of your organization:

- Fundraising
- Communications (& Public Relations if they are separate)
- Campaigning (if you run campaigns. This can also be the education team, or the front line support workers if you are a social service org.)
- Senior Management: Executive Director, VP
- Board Member (if possible; ideally you will find one person with a keen interest in technology and some other experience with it from another org)
- Operations or IT Lead
- Front Line Staff who deal with customers / stakeholders every day
- An actual customer or key stakeholder of your services / campaigns / work
- A major donor or funder of your work

Ideally participants that you ask to participate “get it”, or show some expressed interest in what the web can do to help their work. We never recommend asking people to participate if they have shown no interest or have no understanding of (or personal use) of technology. It's always better to start with people who have passion, build momentum, tell stories of success, and thus attract more people to your cause because you're showing results, and having a better time.

Step 2: Strategic Questions

The following questions, while seeming simple, should not be taken lightly – many can catalyze important organizational, operational, positioning, and strategic conversations about who your organization is at the core, who you serve, why your work is exceptional / why it matters, your key messages, new ways to “win” campaigns, and new ways of engaging your supporters and asking for help.

Through this process you will also ask specific questions about online goals, ideas, performance, and capabilities and solicit these from various perspectives inside your organization. This will give you a holistic view of the challenges and opportunities (sometimes the most holistic view that anyone in your organization has), and will also build support from other departments and people. You will need this support if you are embarking on any ambitious Web 2 plans.

Key Questions to Answer:

- What are the **business** (financial, sustainability) **goals** of your organization? What are the **mission goals**?
- Does your organization have a **strategic plan**? What are the 5 most important priorities for your organization over the next 3 years?
- What does your organization do? **What is the “offering”** of services you provide? Try as much as possible to categorize and prioritize: no organization (business or non-profit) can be an expert at a dozen things; most are lucky if they can do one thing very well.
- Who do you serve? Who are your **target audiences** for your work? Again, categorize and prioritize, you can’t speak to all people with any strength.
- How does your current website work for you? What **performance metrics** can you gather? (typical non-profit metrics include: visits, time on site, key program / educational content viewed, donations, email list size and growth, events, site “members” if applicable, and engagement metrics)
- What does your website need to do better? What are the **top 5 goals or ideas** it could have to be of better service to your organization or audiences.
- Do **others** inside your organization share the same goals and ideas on how the web can support their work? (this is where the Change Team comes in: please gather their goals, concerns, and ideas)

- **Who else in the world** is doing great work that you admire? This could be in your space, or in a different industry (should be in the non-profit world, and an org with a similar scale/size to yours)

- How is your **online team** performing? Do they (you) work well with other teams, helping them publish content and brainstorm new outreach models via the web? Are they trained and equipped to do what needs to be done?

Answers to these questions may not come from only one meeting, as some of them require further thought, consultation, or research. If you are true keener and your organization is ripe for change, we often suggest individual one-on-one interviews with your Change Team members in advance of the full meeting.

Now a note about questions, and listening strategically. Organizations – like people – have their own momentum and history, and things are the way they are often for very sound and rational (if sometimes outdated) reasons. In asking questions, it is important to be curious about why things are the way they are, remain open minded, and build real bridges with people before charging in with new suggestions on how they or their work could change. Change is difficult, and can rarely be “imposed” successfully by an outside force – the desire for change needs to come from the people who work inside a system for it to be real and sustainable.

Your responses to these questions will help set your organizational and personal intentions for the training, and provide content for the first Phase of your Web 2 Plan.

Web 2.0 Plan for ...

The following Web 2.0 Plan outline should provide an overview of how your organization will use the web to reach more supporters, further engage the ones you have, and ensure your organization is aligned and has the people and capacity for ongoing success. The sections in this plan are general categories: most should apply to you and we have covered most of the necessary ground, however you will probably find some sections more or less relevant to your work. Please use this as a guideline (and give us feedback on how we can improve this for future trainings) but take it in the direction you need to be of most value to you.

I: Organizational Purpose, Offering, and Audiences

The place to start all online projects: grounding them into the core of what your organization cares most deeply about, who it serves, and what it does.

Business Goals and Mission Goals

The business goals driving change (and keeping the executives up at night) at my organization are:

Strategic Plan

The 5 main priorities for my organization over the next 2-3 years are:

Our Offering

The primary products / services / solutions we provide to the world are:

Target Audiences

The primary target audiences that are critical to our success that we need to serve with the web are: (include as much demographic, psychographic / behavioural info as possible)

The secondary audiences that are also part of the mix but not the main target are:

II: Participation Design

The essence of Web 2 is participation: creating conversations with your audiences, and offering them an opportunity to meaningfully impact and help your work. Spending time with these core questions before moving straight to tools will ensure your social media project grows from the strengths your organization already has, and increase the probability that people will actually use the tools you create.

Participation Driver:

What is the content, tools, and relationships that give people a reason to visit your site on a regular basis?

Participation Design:

What are the mechanisms that people can participate on your site? (ie blog comments, set up profile, suggest a story forms, social bookmark us). Think of them from low to high impact.

Participation Value Proposition:

What is the value people get from visiting the site? What are the tangible and intangible rewards they get for contributing to the site?

Target Actions:

What are the top actions that you want your target audience to take? These should balance meeting their stated needs with your site with meeting your business goals.

Target Audiences

Audience	What do you want to <u>tell</u> them	What do you want to <u>offer</u> them (ie. type of resources)	What <u>action</u> do you want them to take
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Primary:			
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Primary:			
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Secondary:			
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Secondary:			
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III: Content, Technology, and Design Requirements

If your Web 2 plan will require a major change to the content, design, or technology powering your current website or sites, the following categories will be important to answer. These are typically the “meat” of a website redesign project plan that a technical vendor or contractor would use to create a new site.

Content Plan

What new content needs to be created to appeal to our target audiences and meet our business goals? Where will this new content come from?

Information Architecture

What is the new information / story structure for your site? The most sophisticated I/A's use labeling that is descriptive (ie doesn't make a user think: "What does that mean / where does that go?"), is consistent (ie doesn't mix topic, task, and audience: pick one), uses the language of your target audience, and tells the story of your organization in the I/A itself. This is hard to do don't expect to get it on your first try!

Functional Specifications

The things that our target audience will need to use in order to reach their goals. Typically a list of technology features written in plain english language of the user and what their needs are with. Typical functional specs include "A Content Management System to enable 3 people in 3 offices the chance to easily update content on the site; A Blog aggregator to take 4 blog feeds on 2 different sites and combine them into one page on the main site; a calendar of events that shows events in both a visual, monthly format as well as in a list, that is updated internally, but registered users on the site can suggest new events for the site moderator to approve."

Design Direction:

The objectives that need to be achieved with a new site design, the emotions and brand values / attributes to be communicated. Also the tactical details of what needs to be designed (ie home page, standard inside page template, custom Donate page, custom Press Room page, e-newsletter template, banners and badges, Facebook Widget, etc).

IV: Promotion, Publishing, and Management

The web is a noisy place. The key to people both hearing about and actually using your tools is to ensure your organization invests as much time and resources in promotion, publishing, and management as it did in the development of new tools. A dedicated “engagement” team – with some technical skills but stronger on content and facilitation - needs to work closely with other outreach and program staff, be responsible for maintaining content, participating on third party sites to reach new people, and grow engagement metrics.

Promotion Plan:

How will you let people know about your new site, tools, content, and stories?

Examples include: badges and banners, email list blasts, email signatures of staff, blogger outreach, media outreach, offline creative (stickers, postcards, etc), contests...

Publishing Plan:

What is the tone and voice of your organization on the web? Are there any people in your organization who will be uncomfortable with the more casual style of the web?

Key questions relating to the ongoing care and feeding of your content:

- *How do you decide what gets on the front page of your site*
- *Who creates content, who manages content, who does outreach to users.*

Community Management Plan:

Key questions relating to the management of and responses to user-generated content:

- *Response plan – how quickly will you respond to user questions or comments? Will you track responses in a CRM?*
- *Crisis communications – what will you do when someone says something bad about you work / your org / your leaders*

- *Privacy – how will your site be compliant with national privacy regulations? Are there any specific reasons why your organization requires more stringent regulations?*

- *Resources – will you use any volunteer or member resources to support community facilitation or publishing? How will you manage them?*

Internal Management Plan:

How much additional time will be required to successfully publish, promote, and manage your new online tools? How can this additional time requirement be justified to the people who establish budgets in your organization?

Additional Ideas: