

# Social Media Diagnostic

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## Objectives

- Clarify the role of social in the organization's communications objectives
- Evaluate social platforms' ability to reach your target audiences
- Assess current social media presence relative to standards of quality

## Outcomes

- Scorecard of current social media practice
- Resources for further improvements

## Estimated Completion Time

40 minutes to 1 hour

A majority of Washington Insiders now access social media for policy work (fig. 1, p. 2), preferring some platforms for monitoring people and organizations, others for sharing information, connecting with personal networks, or influencing opinions (fig 3, p. 3). As a result, advocacy groups struggle to determine which platforms are suited to their work in Washington and what types of content they should share in order to make an impact.

The Social Media Diagnostic tool developed by National Journal Communications Council allows our Members to evaluate their social media efforts along 30 different social media practices. This assessment reveals development opportunities on social platforms as well as potential areas of investment in systems or skills.

# Social Media Uses and Purposes for Policy Work

**Figure 1:**

## Perceptions of Social Media's Role in Daily Policy Work

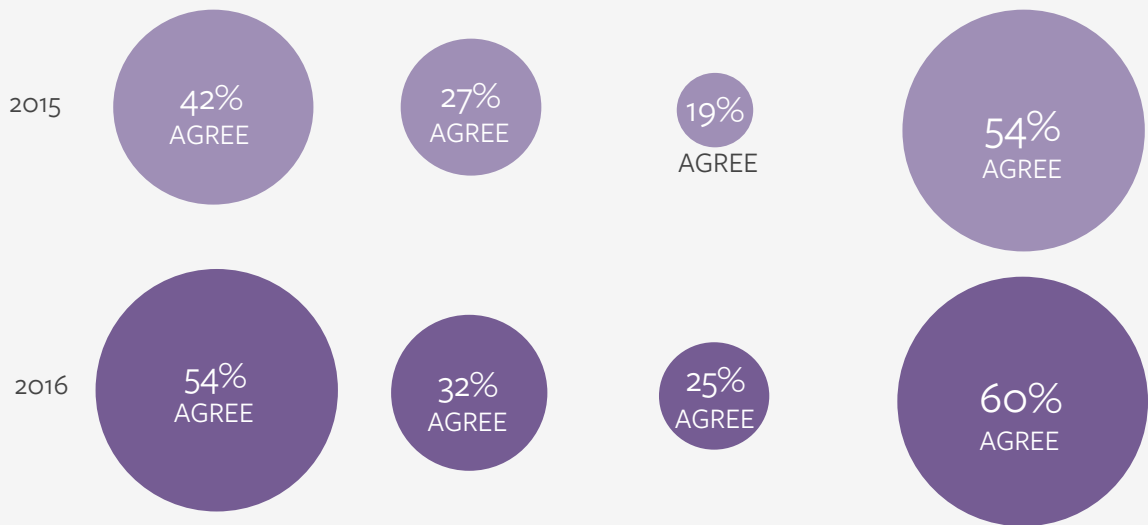
Percentage of All Respondents, 2015 vs. 2016

Accessing information on social media is an important part of my daily work.

I rely on information I find on social media to help me formulate my opinions.

The information I find on social media regularly influences my policy-related decisions or actions.

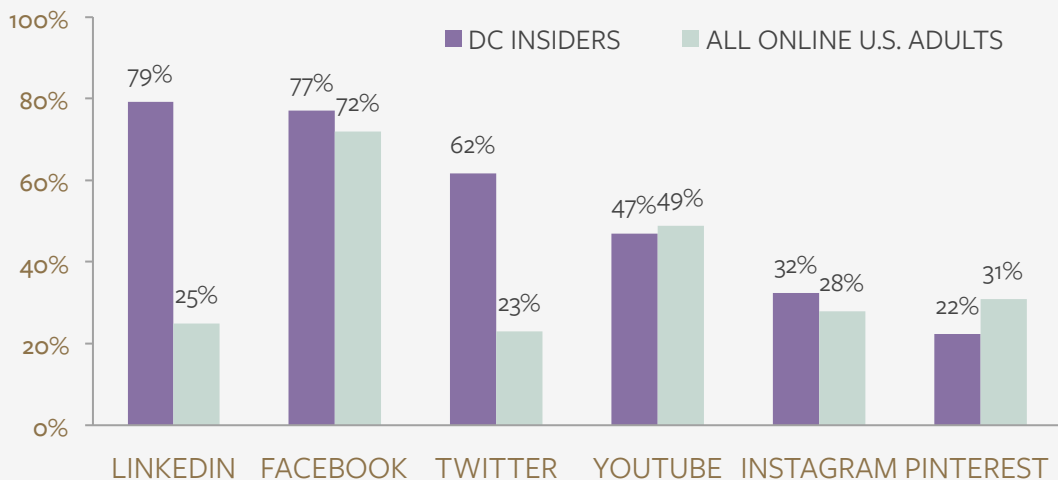
I expect to rely more on social media to help me do my job in the next 1-2 years.



**Figure 2:**

## Comparison of Social Media Platform Usage

Percentage of Washington Insiders Who Have Used Platform vs. All Online U.S. Adults



Source: National Journal Communications Council research and analysis; Pew Research Center Survey, 2015

# Social Media Uses and Purposes for Policy Work

Workplace use cases for social platforms are becoming more common in Washington, but Insiders delegate specific tasks to each platform. The top use cases for the three most popular platforms in Washington are outlined below.

## How Washington Insiders Use Social Media

Insiders access social media for their work in Washington for a variety of reasons:



### To Monitor:

- individuals or personalities
- conversations and trends



### To Discover:

- News and information
- Others' opinions



### To Share:

- News and information with their networks
- Opinions with their network



### To Build:

- Their own brand in Washington
- Their organization or office's brand in Washington

## Insiders' Top Three Social Platforms

As Defined by Their Use For Work In Washington



**LinkedIn:** *Monitoring and Personal Branding*



**Twitter:** *The Multipurpose Workhorse*



**Facebook:** *Sharing and Discovery*

## Part One: Clarifying Purpose

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Social media can be fun, communal and engaging, but achieving that effect takes planning. Whether your organization is opening its first social account or posting on multiple networks, your presence should be shaped by an overall philosophy and approach to communications.

The five questions below are meant to guide a discussion among you and your team. The questions will help you arrive at the approach that is most appropriate for your organization's resources and needs.

### **On Philosophy:**

- 1) To what degree does social media offer a utility that other platforms do not? How does the Communications team envision social's role in serving the needs of the organization and its audience?
- 2) How nimble is your team when it comes to creating text, visuals and/or multimedia? Can you create content quickly in-house, or do you rely on outside consultants?
- 3) How would social listening and conversation play a role in engaging your audience? Is your team prepared to interact professionally and efficiently in a public forum?
- 4) Would your organization be better served by distributing broad updates to a wide audience? Or by delivering highly-specific content to targeted audiences?
- 5) Are staff, leadership, or affiliate organizations active on social media? To what degree could they be involved in audience-building or information-sharing?

With your answers in mind, use the chart on the next page to assess which approach is best suited to your organization's current resources and needs.

## Part Two: Social Presence Assessment Tool

Read the options in Column A and Column B. Check the boxes in each row that best apply to your organization. You may select boxes in both columns if both scenarios are true.

	COLUMN A	COLUMN B
<b>Target Audiences</b>	<input type="checkbox"/> Organization’s members or stakeholders	<input type="checkbox"/> Business leaders, policymakers, local and national media, or other outside groups
<b>Branding Goals</b>	<input type="checkbox"/> To deepen brand value to those who are already familiar	<input type="checkbox"/> To build or reinforce brand with those who may be less familiar
<b>Utility of Social Platforms</b>	<input type="checkbox"/> To target messaging and content to key demographics	<input type="checkbox"/> To gauge interest in the organization via reach and engagement
<b>Content Considerations</b>	<input type="checkbox"/> Ability to divide content into “snackable” elements that deliver custom insights to key audience segments	<input type="checkbox"/> Ability to surface and share relevant resources when topics are trending
<b>Experimentation Orientation</b>	<input type="checkbox"/> Desire to experiment with engagement opportunities. Willing to try out new social features and adapt content to platforms to see what works.	<input type="checkbox"/> Uninterested in experimentation. Prefer to use tried-and-true strategies to connect with target audiences.
<b>Social Monitoring Preferences</b>	<input type="checkbox"/> Staff will monitor platforms and respond to questions and comments. We will have a streamlined content approval process to expedite responses.	<input type="checkbox"/> Social presence is important, but prefer to “set it and forget it.” Schedule daily or weekly posts with occasional engagement check-ins.

Tally up the total number of boxes you checked in columns A and B.

If column A has more checks, your social presence is **community-driven**. Your organization should adopt platforms that focus on relationship-building. These platforms will promote interactions such as sharing, liking, or commenting. Accounts should be run internally, either by the communications team or by other departments with guidance from comms.

If column B has more checks, your social presence is **awareness-driven**. Your organization should adopt platforms that prioritize information monitoring or brand-building. Accounts can be run either by the communications team or by an outside firm with guidance from communications.

If your responses are split between both columns, your social presence may be **platform-driven**, with tactics optimized for the audience you are targeting on each network. The exercises on the follow page may help you determine the best approach for each platform.

## Part Three: Developing Strategy

Any organization's communications strategy will be influenced by the rhythms and culture of the social platforms they inhabit. The five questions below will assist in pinpointing the social platforms that will best serve the organization's communications goals.

On Platform Selection:	Yes	No
1. Are key demographics using this platform?	<input type="checkbox"/>	<input type="checkbox"/>
2. Does this platform have tools for organizations to effectively reach key audiences? (e.g., ability to target audiences by demographics or features for uploading email lists)	<input type="checkbox"/>	<input type="checkbox"/>
3. Does your Communications team understand how their preferred communities use the platform in question?	<input type="checkbox"/>	<input type="checkbox"/>
4. Is this platform endowed with robust metrics for tracking success of campaigns? Or can it be integrated with our current analytics framework?	<input type="checkbox"/>	<input type="checkbox"/>
5. Does this platform have a mechanism to directly promote or target messaging to key audiences?	<input type="checkbox"/>	<input type="checkbox"/>

If you answered "yes" to **all** of the questions above, the platform is a good candidate for your organization. If you answered "yes" to a **majority** of the questions, consider a trial adoption first.

For mostly "no" responses, consider other ways that you organization could adapt social features to benefit the organization. A listserv, message board, or other social platform may be more effective.

Use the responses from your team from the previous two exercises to form a social strategy that balances your organization's goals with the demands of the platform.

Community-Driven Approach	Awareness-Driven Approach
<p><b>Post frequency:</b> match platform recommendations for posting rates</p> <p><b>Time of day:</b> distribute content evenly throughout the workday, consider posting during the evening commute, before bed, and on weekends</p> <p><b>Followers:</b> if platform allows you to follow other users, follow members, staff, and affiliated groups</p> <p><b>Engagement:</b> share, like, and comment often</p>	<p><b>Post frequency:</b> may be slightly below platform recommended posting rates, except at critical news moments when promotion opportunities may be higher</p> <p><b>Time of day:</b> focus on weekdays during the workday, with fewer posts on weekends</p> <p><b>Followers:</b> if platform allows you to follow others, follow leaders, media, and affiliated groups</p> <p><b>Engagement:</b> occasionally share content from others to show your connection to core issues</p>

## Part Four: Assessing Current Practices

As your organization advances its social strategy, you should continue to evaluate the value of the platform and the effectiveness of your efforts. The following assessment covers social media practices in more depth, providing rankings for strategy, execution, posting processes, and integration with other organizational media.

Use the following rating system when assessing your current level of performance:

<b>0 = We don't do this</b>	<b>1 = Ad hoc; we do this, but not particularly well and not consistently</b>	<b>2 = Routinized; we do this fairly well, most of the time</b>	<b>3 = Optimized; we've got this down to a science</b>
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Each section and subsection(s) will present an opportunity to pinpoint and assess where any potential individual weaknesses may be.



### Instructions

1. Rate each practice either individually or as a team, according to the quality and consistency of your adherence to the stated standard of quality (0-3)
2. Tally up the totals for each subsection (e.g., 1.1 Audience, 2.2 Profiles); then add these together to get the section total (e.g., 1.0 Strategy).
3. Compare your scores to the ideal for each to identify potential opportunities for improvement.

Function ID	Standard of Quality	Rating
<b>1</b>	<b>STRATEGY</b>	<b>/15</b>
1.1	Audience	/6
	<ul style="list-style-type: none"> <li>• Social media platforms' target audiences are specific (e.g., not "the general public")</li> </ul>	
	<ul style="list-style-type: none"> <li>• Clear understanding of audience characteristics/personas, including information needs and engagement preferences</li> </ul>	
1.2	Goals	/9
	<ul style="list-style-type: none"> <li>• Goals and objectives for the organization's social presence are clearly articulated</li> </ul>	
	<ul style="list-style-type: none"> <li>• Social media's role in supporting broader communications goals can be articulated</li> </ul>	
	<ul style="list-style-type: none"> <li>• All objectives can be measured quantitatively and/or qualitatively</li> </ul>	

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Function ID	Standard of Quality	Rating
<b>2</b>	<b>EXECUTION</b>	<b>/60</b>
2.1	Account Management	/12
2.1.1	Security	/6
	<ul style="list-style-type: none"> <li>Login information is shared only with key staff</li> </ul>	
	<ul style="list-style-type: none"> <li>Two-factor authentication is enabled on accounts (when available)</li> </ul>	
2.1.2	Tools & Software	/6
	<ul style="list-style-type: none"> <li>Social media guidelines are documented and accessible to posters; guides are reviewed and updated regularly</li> </ul>	
	<ul style="list-style-type: none"> <li>Accounts are integrated with a system of supporting applications (like Hootsuite or Sprout Social) for cross-platform monitoring, planning, and analytics</li> </ul>	
2.2	Organizational Profile	/12
	<ul style="list-style-type: none"> <li>Content: Profile descriptions or poster biographies explain the mission of the organization and the purpose of the account</li> </ul>	
	<ul style="list-style-type: none"> <li>Visuals: Images and color schemes reflect appropriate branding elements, such as trademarks and colors of the organization</li> </ul>	
	<ul style="list-style-type: none"> <li>Handles: Naming conventions are consistent across accounts (e.g., @nationaljournal, facebook.com/nationaljournal, etc.)</li> </ul>	
	<ul style="list-style-type: none"> <li>Style: Profile includes features customized to each social platform, such as frequently-used hashtags, Snapcodes, or affiliated accounts to follow</li> </ul>	
2.3	Posts	/36
2.3.1	Text Content	/9
	<ul style="list-style-type: none"> <li>Length: Text does not exceed the character limits of each platform</li> </ul>	
	<ul style="list-style-type: none"> <li>Voice: Writing style is on brand for the organization but consistent with the style of each platform</li> </ul>	
	<ul style="list-style-type: none"> <li>Links: Embedded URLs include a thumbnail when the option is available. The thumbnail text does not repeat the text of the post</li> </ul>	
2.3.2	Multimedia Content	/12
	<ul style="list-style-type: none"> <li>Size: Images, gifs, and videos are scaled to fit platforms' recommended dimensions</li> </ul>	
	<ul style="list-style-type: none"> <li>Duration: Audio and video are short, within the platforms' recommended time limits</li> </ul>	
	<ul style="list-style-type: none"> <li>Mobile-Optimized: Files are optimized for mobile (e.g. images are visible on small screens, videos are captioned, etc.)</li> </ul>	
	<ul style="list-style-type: none"> <li>Informative: Multimedia attachments improve the quality and relevance of text content</li> </ul>	



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


















Function ID	Standard of Quality	Rating
<b>2</b>	<b>EXECUTION (cont'd)</b>	<b>/60</b>
2.3	Posts (cont'd)	/36
2.3.3	Engagement	/9
	<ul style="list-style-type: none"> <li>Social Elements: Content includes hashtags, mentions, filters, geotags, or other features, as appropriate for the platform</li> </ul>	
	<ul style="list-style-type: none"> <li>Interaction: Posts exist in the universe of the platform and conform to its trends when relevant (i.e., observing social “holidays” and following network etiquette, such as “liking” or “sharing” content by others)</li> </ul>	
	<ul style="list-style-type: none"> <li>Conversation: Posts are used to initiate conversation with followers and to respond to their questions, curiosities, and concerns</li> </ul>	
2.3.4	Distribution	/6
	<ul style="list-style-type: none"> <li>Frequency: Posts are published at a consistent pace and match either the rate recommended by the platform or the rate of similar accounts</li> </ul>	
	<ul style="list-style-type: none"> <li>Scheduling: Posts are released at times when they are likely to be seen by your platforms’ target audiences</li> </ul>	
<b>3</b>	<b>INTEGRATION</b>	<b>/21</b>
3.1	Website	/9
	<ul style="list-style-type: none"> <li>Promotion: Either social channel content is prominently featured on the home page or social icons are displayed near the top of the home page</li> </ul>	
	<ul style="list-style-type: none"> <li>Sharing: Social sharing buttons are embedded in blog posts or other web content</li> </ul>	
	<ul style="list-style-type: none"> <li>Media: Web content is optimized for sharing on social media</li> </ul>	
3.2	E-Newsletters	/6
	<ul style="list-style-type: none"> <li>Promotion: Social icons are featured in the header or footer of e-newsletter(s)</li> </ul>	
	<ul style="list-style-type: none"> <li>Sharing: Social sharing buttons accompany content pieces in of e-newsletter(s)</li> </ul>	
3.3	Events	/6
	<ul style="list-style-type: none"> <li>Promotion: Social channels are promoted at events via printed materials, real-time content displays, or mentions by speakers, moderators, and panelists</li> </ul>	
	<ul style="list-style-type: none"> <li>Sharing: Attendees are encouraged to use social channels to engage with the organization before, during, and after the event</li> </ul>	

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Function ID	Standard of Quality	Rating
<b>4</b>	<b>PROCESS</b>	<b>/21</b>
4.1	Roles & Responsibilities	/6
	<ul style="list-style-type: none"> <li>Individuals have a clear understanding of expected contributions across the social media lifecycle: planning, creation, testing, scheduling, and measurement</li> </ul>	
	<ul style="list-style-type: none"> <li>Team responsibilities are assigned according to the level of social engagement expected on the platform (e.g., dedicated messenger for livestreams; afterhours monitoring during impactful events)</li> </ul>	
4.1.2	Approvals	/6
	<ul style="list-style-type: none"> <li>Social media guidelines are documented and accessible to posters; these guides are reviewed and updated regularly</li> </ul>	
	<ul style="list-style-type: none"> <li>Time-sensitive procedures are in place for clearing content with leadership; leaders are regularly briefed on strategy and purpose</li> </ul>	
4.1.3	Coordination	/9
	<ul style="list-style-type: none"> <li>Cross-platform content releases are coordinated internally; content is posted on social media at the same time as other channels</li> </ul>	
	<ul style="list-style-type: none"> <li>Internal departments are aware of access and outreach to shared audiences and the nature of these communications</li> </ul>	
	<ul style="list-style-type: none"> <li>All department, staff, and affiliate social media accounts are working towards complementary goals</li> </ul>	










## Additional Resources

The following is a list of tools and software that may be useful for supporting your social media presence. The illustrated key explains the utility of each platform.

Analytics	Content Creation	Profile Management	Scheduling	Social Listening	Multi-platform	Social Media Tool / Software
						<p><b>BuzzSumo</b></p> <p>BuzzSumo is an all-in-one platform for analysis and tracking. It contains a social search engine, influencer trackers, and content reports and analytics, among other features. Useful for seeing the day's trending content, surfacing content about your organization, and tracking backlinks from other accounts. Paid, some features have free trials.</p> <p><a href="http://buzzsumo.com/">http://buzzsumo.com/</a></p>
						<p><b>Hashtagify</b></p> <p>Hashtagify is a web application for monitoring Twitter and Instagram hashtags. Useful for comparing hashtags, finding related hashtags, and locating influencers who often use keywords. Some Twitter features are free, but expanded Twitter options and all Instagram features are paid.</p> <p><a href="http://hashtagify.me/">http://hashtagify.me/</a></p>
						<p><b>Keyhole</b></p> <p>Track hashtags, mentions, accounts, keywords, or urls across social channels. Useful for influencer insights like the times of day they post and their most-used hashtags. Also useful for finding the demographics of hashtag and url posters, sentiment analysis of posts, and timeline of social activity. Generous free preview of most services, but full features are paid.</p> <p><a href="http://keyhole.co/">http://keyhole.co/</a></p>
						<p><b>IFTTT (If This, Then That)</b></p> <p>IFTTT is an open source, all-purpose tool for automating processes. The tools work on triggers; if something happens, then a resulting action will follow. Users can download existing "recipes" for automating processes like updating your profile on Twitter if you post a new profile photo on Facebook. Useful for setting up alerts, generating analytics reports or automating posts. Free.</p> <p><a href="https://ifttt.com/">https://ifttt.com/</a></p>
						<p><b>Hootsuite</b></p> <p>Hootsuite is a platform for scheduling, tracking, and analysis of social media. Useful for pre-planning posts, social listening, notifications for relevant content, and analysis of platform engagement. Basic scheduling and social listening is free. Analytics and advanced features are for paid users.</p> <p><a href="https://hootsuite.com/">https://hootsuite.com/</a></p>
						<p><b>Dashboard for Twitter</b></p> <p>Twitter's version of Hootsuite, with similar features. Free.</p> <p><a href="https://dashboard.twitter.com/">https://dashboard.twitter.com/</a></p>

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Analytics	Content Creation	Profile Management	Scheduling	Social Listening	Multi-platform	Social Media Tool / Software
						<p><b>TweetDeck</b></p> <p>Twitter's platform for social listening, which allows users to monitor and respond to conversations in real time. Useful for tracking Twitter-specific engagements, such as following Lists, Hashtags, Mentions, and engagement actions. Free.</p> <p><a href="https://tweetdeck.twitter.com/">https://tweetdeck.twitter.com/</a></p>
						<p><b>Pablo</b></p> <p>Pablo is a web app for creating social media images. The app provides templates, filters, stock photos and quotes, but users may also opt to upload their own media. Customize with text overlay or add your organization's logo, then download pre-sized images for social. Free.</p> <p><a href="https://pablo.buffer.com/">https://pablo.buffer.com/</a></p>
						<p><b>Canva</b></p> <p>Canva is an application for creating images. It includes templates for social media. It's useful for organizations seeking pre-made layouts or an easy-to-use visual editor for uploaded images. Free, but some advanced features are for paid users only.</p> <p><a href="https://www.canva.com/create/social-media-graphics/">https://www.canva.com/create/social-media-graphics/</a></p>
						<p><b>Landscape</b></p> <p>Landscape is a web app for resizing images for social media. Upload an image and the app will automatically resize for selected platforms. Free.</p> <p><a href="http://sproutsocial.com/landscape#">http://sproutsocial.com/landscape#</a></p>
						<p><b>Holiday Calendar</b></p> <p>Social media loves a pre-planned engagement opportunity. Holiday calendars highlight unique opportunities for engagement, such as National Book Month or World Peace Day. Use these opportunities to plan relevant but interesting engagement opportunities. Free.</p> <p><a href="http://www.holidayinsights.com/moreholidays/">http://www.holidayinsights.com/moreholidays/</a></p>
						<p><b>AP Planner</b></p> <p>The Associated Press's Twitter account for their calendar service features a limited free selection of major national events. You can use their updates to plan content a few days in advance.</p> <p><a href="https://twitter.com/ap_planner">https://twitter.com/ap_planner</a></p>

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