

Social media toolkit: Worksheets



Worksheet for stage one

Identify your drivers to use social media and your aims when using it

The driver(s) to use social media is:

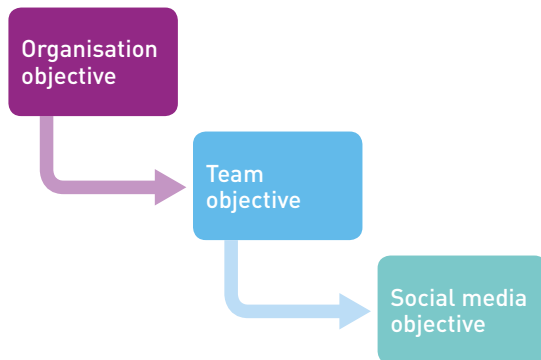
What we aim to achieve by using social media is:

Our proposed aim is achievable because:

Our proposed aim is warranted because:

Worksheet for stage two

Align your social media objectives to your organisation's objectives



Our proposed aim fits with the following organisation objectives:

- a _____
 b _____
 c _____

Our team's work helps to achieve the following organisation objectives:

- a _____
 b _____
 c _____

Of these objectives, social media could help achieve:

- a _____
 b _____
 c _____

Our proposed social media objectives are:

(specific, measurable, achievable, realistic and timebound – SMART)

SMART objective	Notes

Worksheet for stage three

Map your online stakeholders

Place the names of your top five stakeholders in the circles below. Use the table overleaf to note which social media platforms they are using, if any, and then list the top three platforms used by your top five stakeholders on the lines below.



The top three social media platforms used by your top five stakeholders:

- 1 _____
- 2 _____
- 3 _____

Worksheet for stage four

Resources and possible reward

Stakeholder	Social media platform in use	Frequency of use
1		
2		
3		
4		
5		

Notes:

Worksheet for stage four

Continued

Plan the time taken to set up your social media work.

Task	Estimated time to complete (hours)
Briefing your manager	
Briefing the executive (board paper) See our briefing, <i>Social media for chief executives: the essential guide</i>	
Securing your usernames on your chosen social media platforms	
Deciding on and designing the monitoring and reporting mechanisms	
Engagement with other relevant teams from across the organisation (HR, IT, PALS, Council of Governors etc)	
Mapping your stakeholders' online presences (who will you be talking with and where?)	
Engagement with stakeholders (HealthWatch, bloggers, campaign group, local media)	

Total = _____ + contingency = _____ hours

On the next page, estimate the amount of time your social media work will take each week.

Worksheet for stage four

Continued

Weekly task – estimate how many working hours it will take you to maintain your social media objectives.

Task	Estimated time to complete (hours)
Monitor the account(s)	
Report on the activity on the account(s) to the team's manager	
Reply to interactions on the account(s)	
Plan content for the account(s)	
Create the content for the account(s)	
Monthly report on the activity on the account(s)	

Total = _____ + contingency = _____ hours

If we achieve our proposed aim, we would get the following return/success:

This return/success is worth the resources indicated above because:

By following our proposed aim we could replace the following work areas with our social media plans, freeing up resource within the team

Worksheet for stage five

What is your content and where is it going to come from?

Have you got the capability (software, hardware and skills) to produce social media friendly content?

Does the wider team have the capability to produce social media friendly content or will all or most content creation fall to you or one colleague?

What changes would you need to make to the way in which you currently work to produce social media friendly content?

Does your organisation have a sign-off process for social media? If so, who has control over the process? Can they quickly sign-off any urgent / sensitive messaging?

Worksheet for stage five

Continued

List your possible sources of content for each platform you intend to use:

Platform	Source	Content

Each week we would aim to create the content shown below.

Platform	Content	Frequency

Worksheet for stage six

Evaluating your work

List which **outputs** you will measure and how they will help you stay on track to achieve your aim and objectives.

Output	Frequency of measurement	How it will help

List which **outcomes** you will measure and how they will help you stay on track to achieve your aim and objectives.

Output	Frequency of measurement	How it will help

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