



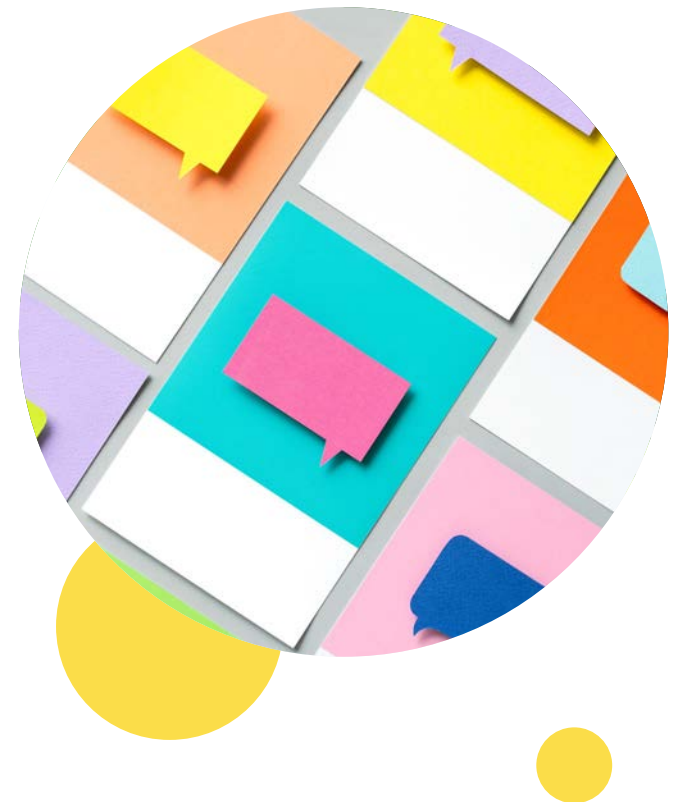
**SARAH BEST
STRATEGY**

How to Plan Social Media Content in a Time-Efficient Manner

For Your Nonprofit or Small Business



Presented By Park Bank



Peter Benson

Senior Vice President, Business Services

With both a Graduate School of Banking degree as well as an undergraduate degree from the University of Wisconsin, Peter has fulfilled a number of banking roles with Park Bank, culminating in his current position as Senior Vice President of Business Banking. Peter has worked with all types and sizes of businesses and helped meet financing needs ranging from small startup capital to major expansion funds. Give Peter a call today to share your vision for your company. He'll help you get there.





About SBS

Who are we?

We are an award-winning agency that empowers companies and organizations to **shine in the digital space**, so that they can better achieve their missions and goals.

We do this by:

- Helping teams get stronger with their marketing
- Extending the bandwidth of busy teams





Our Clients





Answer in the Chat

- Your name
- What organization or business you represent

- **Question of the day:**

How many hats do you wear in your job? What percentage of your job is focused on social media?



“

The essence of strategy is choosing what *not* to do.

- Michael A. Porter, [Harvard Business Review](#)





This is how we'll explore this topic


- Discuss best practices for choosing what *not* to do
- Best practices for social media content planning...as tested in hundreds of companies
- Tips for adapting your content across platforms
- How to think about AI and tools and techniques for saving time






Where to a Copy of This Talk

 sarahbeststratetgy.com/parkbank

 I encourage you to share your expertise as we go in the chat.

 Please use the Q&A feature to ask questions. We'll save 15 minutes at the end for Q&A.

 Printable worksheets on pages 46-57





Tools for Figuring Out What *Not* To Do



Vision Statement

Crafting a clear vision statement can help you motivate your team, prioritize **time, budget, and resources**, and get **buy-in** across your organization.

A lack of vision often leads to **wasted resources, wasted time, and low motivation.**





We transport our fans into the field to see and understand the impact of our work, and invite them through clear and thoughtful calls-to-action to conserve nature for its own sake, and its ability to fulfill our needs and enrich our lives.”

Nature Conservancy



Crafting Your Vision Statement

- We are using social media in order to _____.
That's important to us because _____.
- Ask the questions “What would we like to do?” across a team and listen for points of consensus and points of conflict.
- Nonprofits: Think about your mission statement and how social media supports that work.
- Small Businesses: Think about a new product, service offering, or vertical you'd like to get into.
- What are your “blue sky” aspirations?
- Not written in stone. It changes over time.
- Vision statements suggest stories that you might like to tell.



Goals

Why do goals feel so scary?

- We have too many of them
- They're too big
- We can't act on them
- We're not sure if we're picking the right things to focus on
- We feel like we don't know enough to set them





Reframing

- We have a reasonable number of small goals we can achieve within a specific timeframe and we look at them regularly
- They are actionable and specific enough that we know whether an activity is complete or if we've seen improvement
- We have the wisdom to choose things that matter to us because the goals serve us (not the other way around)





If things feel too intangible...try S.M.A.R.T. Goals

- **Specific:** Can I act on this? Is it too vague? Do I have enough information?
- **Measurable:** We know when the activity is complete
- **Actionable or Achievable:** We have the time or resources to do the activity. It's not unrealistic given our current boulders.
- **Realistic and Relevant:** Activity is relevant to our vision or our broader goals.
- **Timebound:** We know when we're doing it by.



Examples: Reaching New Donors or Customers



S.M.A.R.T. Goal: Reaching new Donors or Customers (Advanced)

- S: We'd like to gain email addresses for 25 people we can send a lead nurturing email to ahead of a product launch or giving campaign.
- M: We'll know that we've achieved our goal when we collect 25 email addresses from a lead generation magnet on our website, or lead generation ads on Facebook and LinkedIn.
- A: This goal is achievable because we have a lead generation campaign template that we can update with information on our new product, service or campaign.
- R: This is relevant to our vision because we'd like to expand our pool of customers and donors, and we have good luck cultivating them through email.
- T: We'll do this ahead of our Q4 product launch / fundraising campaign?

S.M.A.R.T. Goal: Reaching new Donors or Customers (Beginner)

- S: We'd like to invest some time in learning about ways to grow our donor base / customer base.
- M: We'll know that we've achieved this if we've found three YouTube videos or articles with good ideas, and have talked internally about what ideas make sense for us.
- A: This goal is achievable because we can spend 30 minutes looking for YouTube videos or articles and have set time aside next week to talk about what we've found.
- R: This is relevant to our vision because we'd like to find more people to participate in an action later this year.
- T: We'll do this by the end of next week.



Best Practices for Social Media Content Planning



At its essence, a social media plan is...

- A calendar with topics written on it assigned to dates.
- A topic is a short phrase that reminds you what you want to talk about.
- Could look like: A whiteboard, a physical calendar, online calendar, calendar in a social media management tool, a spreadsheet with a dates column, a list in a notebook or notes app.





Planning Saves You Time

1. Stop feeling like you constantly have to put out fires
2. Reminds you to be strategic
3. We have finite time
4. Update last year's plan





Plan Topics, Not Posts

1. Posts don't translate between platforms, topics *do*
2. Topics work on email, social, on blogs and website topics
3. More people can participate if you're not stuck in the weeds of what to do





How You Plan Matters

- Try to get as many people in the room as possible to brainstorm social media topics.
 - Vision-owners
 - People who are creating social media content
 - People with an ear on the ground



What does planning look like?

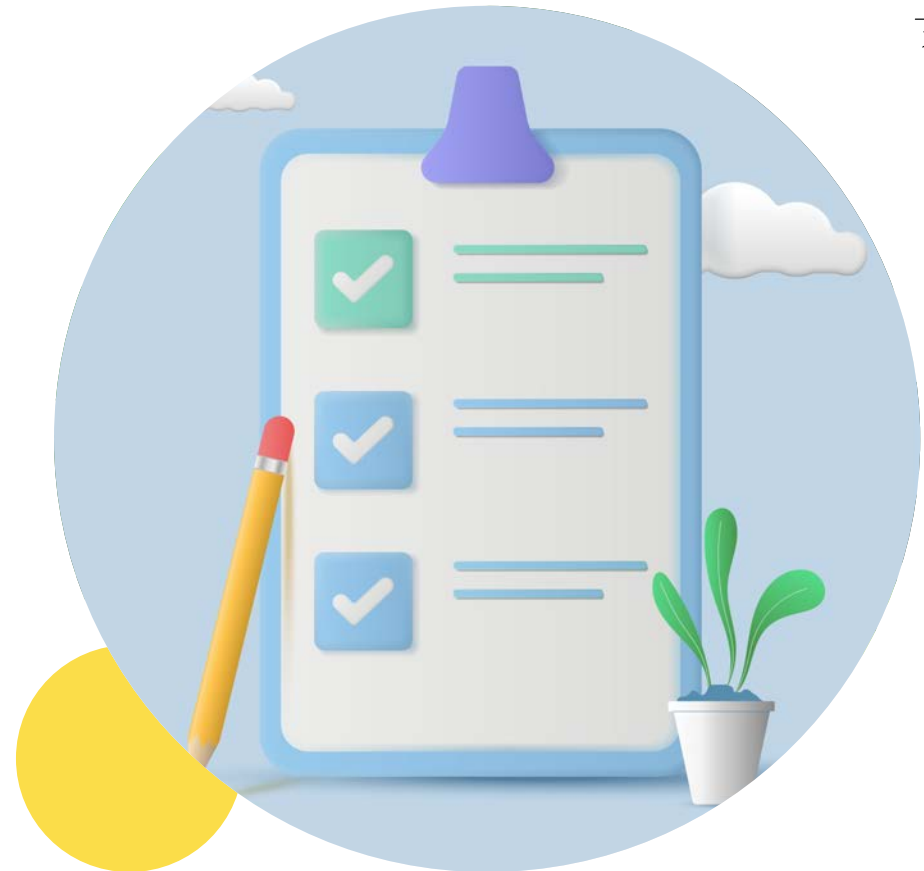
- It could look like meeting once a month with a whiteboard or some sticky paper up on the walls
- It could look like jumping on a Zoom and looking at a spreadsheet, calendar, or jam board together
- It could look like you taking time out to pull out a dedicated notebook or notes app and writing a plan for a month
- Ground rules – don't step on other people's lightbulbs, marketing team has final say





Establish a List of Content Buckets

- Outline all of the topics you *tend* to talk about on a regular basis.
- Organize it in a checklist!
- Refer back to this checklist every month when you're doing your monthly content planning meeting or session
- You only have to develop a checklist once, and review once a quarter or once a year





Examples of Content Buckets

- Events, Programs, Service Offerings
- Stories We Want to Tell Over Time
- Case Studies
- Hiring, Culture, Meet the Team
- Inspire, Educate, Inform
- Calls to Action
- Partners You'd Like to Tag or Shout Out, Influencers, Collaborators
- Key Messages for People Who Haven't Met You Yet
- By Persona – Young Families, Young Professionals, Empty Nesters
- By Theme





Our Content Buckets Give Us a Checklist

Content Bucket	<i>The types of things we tend to talk about each month.</i>
Upcoming Events, Timely Issues, Holidays	What's coming up this month? What's happening in our audience's lives right now?
Meet Staff / Volunteer	Which staff member or volunteer would we like to highlight this month?
Partner Shout Out	What partner can we shout out this month?
Program News #1	Which programs do we want to highlight this month?
Program News #2	Which programs do we want to highlight this month?
Key Messages	What's our message this month for people who don't know us yet?
Ask #1	What do we want people to do this month?
Ask #2	What do we want people to do this month?

Source: <https://www.proyectopastoral.org/>



Content Buckets for a Small Business

Great Dane Pub Content Buckets

Events

Beer Releases

Menu / Specials

Promotions

Community Involvement

News

Plan Your Visit

Hiring / Work Culture

Calls to Action




Next...write out some topics.

Content Bucket	Topic for May
Upcoming Events, Timely Issues, Holidays	Peace and Healing Center Calendar in May, Happy International Workers Day, Get Out the Voice Events
Meet Staff / Volunteer	Welcome Angela, Coordinator of Community Organizing for Comunidad En Movimiento
Partner Shout Out	Women's Leadership Initiative
Program News #1	Guadalupe Homeless Project – Pathway Forward – Empowerment Clinic
Program News #2	IMPACTO
Key Messages	We walk side-by-side and in solidarity with Boyle Heights residents to build a healthy, safe, and thriving Boyle Heights community for all.
Ask #1	Apply for Case Manager Position
Ask #2	Donate
Source: https://www.proyectopastoral.org/	



Calendar – Nonprofit Example

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
 A cartoon illustration of a rabbit wearing a blue and white striped nightgown and a matching nightcap. The rabbit has a grumpy expression and a thought bubble above its head that says "I HATE MONDAYS". The rabbit is sitting on a white surface with two small white shoes.	Thank You Note		Ask #1	
	Storytelling About Issue or Impact	Key Issue Update	Ask #2	
	Upcoming Event Reminder #1		Ask #3	
	Upcoming Event Reminder #2		Volunteer or Partner Shout Out	



Calendar - Small Business Example

TOPICS:

- Events
- Beer Releases
- Menu / Specials

SUN	MON	TUES	WEDS	THURS	FRI	SAT
		NEW MENU ITEMS	FAN CONTENT	CALLS TO ACTION		
1	2 Holiday Hours	3 – New Beer Release	4 – Fan Photo	5 – Beer Special	6 –	7
8	9 Community Involvement	10 – Menu / Specials	11 - Fan Giveaway	12 – Sign Up for Our Newsletter	13 -	14 – Badger Game
15	16	17 – New Beer Release	18 – Fan Photo	19 – Book a Group or Party	20 –	21 –
22	23	24 – Menu /Specials	25 – Fan Photo	26 – Buy a Gift Card	27 –	28 – Badger Game
29	30	31 – New Beer Release				





Five Other Questions to Ask During Planning Meeting

1. What actions do we want people to do after they've seen our posts?
2. How do we know if they did that or not?
3. What events or timely issues are happening in our audience's lives this month?
4. What broader conversations are happening outside of our organization?
5. Who can help us get the word out this month?



Image credit: [VICE Gender Spectrum Images Collection](#)



Answers to Other Key Questions

Key Actions	Events / Timely	Events / Timely	Word Out?	Key Metrics
Apply for Case Manager position. Donate.	International Workers Day	Guadalupe Homeless Project – Pathway Forward – Empowerment Clinic	Women’s Leadership Initiative	Number of applications or donations received. Engagement on job post. Visits to a donation page from social media.



Time Saving Tools Techniques



Answer in the Chat

Pop Quiz

If you give a child a choice about whether they'd like to fold a big pile of laundry or a small pile of laundry, what would they choose?



Framework source: [John Maeda, VP of Design and Artificial Intelligence at Microsoft](#)



Answer in the Chat

Pop Quiz

If you give a child a choice about whether they'd a really big cookie or a small cookie which would they choose?



Framework source: [John Maeda, VP of Design and Artificial Intelligence at Microsoft](#)



How AI Helps, and what *Not* to Use it For

- “We want to use AI to reduce the things that don’t spark joy and make the things that do spark joy easier.” John Maeda
- ✨ Increase things that spark joy ✨
- 😞 Decrease things that don’t spark joy 😞

Framework source: [John Maeda, VP of Design and Artificial Intelligence at Microsoft](#)





Things that Spark Joy ✨

- Decision making
- Talking with people
- Learning with others
- Mentoring / Coaching
- Relationship Building
- Crafting Strategies



Framework source: [John Maeda, VP of Design and Artificial Intelligence at Microsoft](#)



Things that Don't Spark Joy 😬

- Calendar Management
- Writing Email Subject Lines
- Summarizing Long Pieces of Writing for Social Media
- Applying writing style guides
- Checking other people's writing for brand voice adherence
- Doing competitive research
- Looking for something in a database
- Monitoring for alerts



Framework source: [John Maeda, VP of Design and Artificial Intelligence at Microsoft](#)



When You're Short on Time, Adapt Content Across Platforms

- No one will die 🧠
- What's more important?
 - Consistency or content differentiation?
 - Strategy or differentiation?
 - Working extra to do more than your bandwidth allows or work life balance?





Cheat Sheet for Adapting Social Media Posts

- Blog Post: 3-5 paragraphs
- Email teaser: 1 paragraph
- Social media post: 1 sentence
- Video: start with the hook - 15-60 seconds
- Video can also yield audio files
- If you want to make just one graphic without resizing, square (1080x1080) is the safest size.
- A square graphic will work on Facebook, Instagram, LinkedIn, and Twitter. Otherwise, refer to best practices for each platform
- Use vertical videos in short-form video formats.





What to Watch Out For When Adapting

- ⊖ Don't autopost from one platform to another, use a scheduling tool instead
- ⊖ Adjust handles and tags
- ⊖ Adjust hashtags
- ⊖ Video: sound on or sound off platform by default?
- ⊖ Your call to action will change slightly across platforms. Facebook, LinkedIn and Twitter all allow clickable links in your copy, but Instagram does not. If adapting to IG, it is best to put the link in your bio.
- ⊖ TikTok is not super reliant on captions at all. Get the message in the video itself.

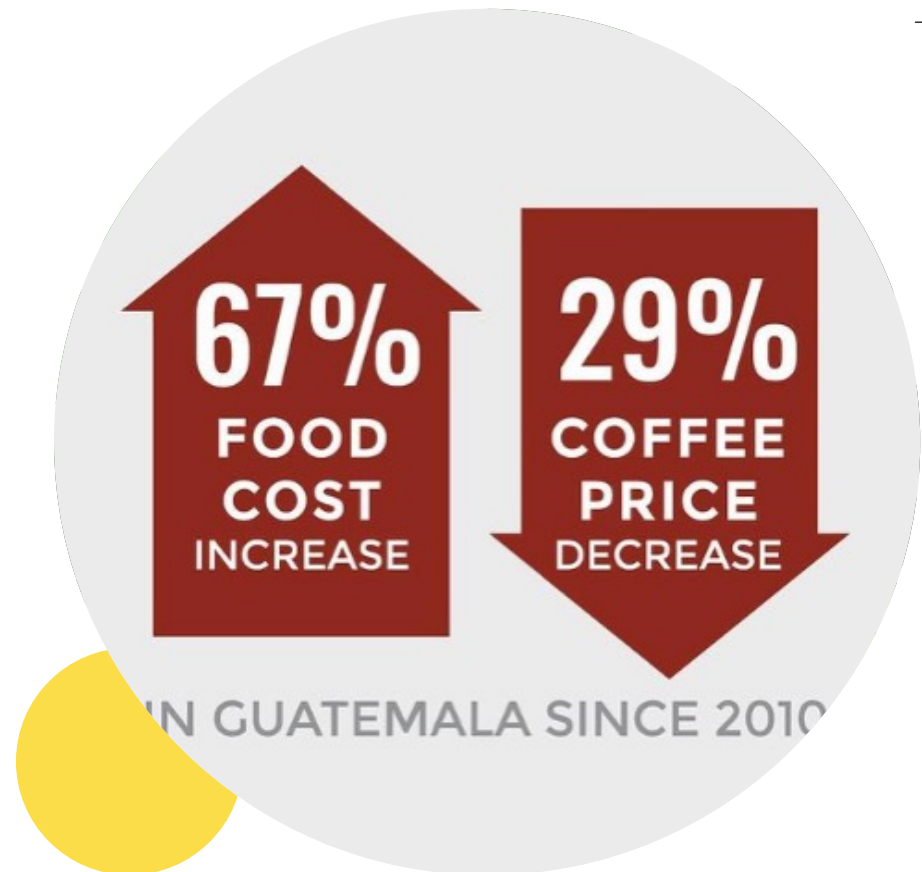




Take a Social Media First Approach to Annual Reports

- Create infographics you can reuse on social
- Create "snack sized" content from the get-go
- Use it as an excuse to gather stories or get updated photography
- Impact stats

Source: [Food 4 Farmers](#)





Use Planning and Evergreen Content to Have Predictable Layer to Add Fresh Content to

- Evergreen content is content that never goes out of date or which recurs annually
- Evergreen content saves you time because you can reuse it, or tweak it to freshen it up a bit
- Look for it on your website, in campaign materials for recurring campaigns, in brochures, last year's social media posts





Organize Your Visuals

- Give Canva a try – save brand colors, fonts, logos, and organize projects
- Half the battle of doing social is having video and visual content
- Use descriptive file names
- Use a file naming convention
- Categorize your visuals but don't have too many subcategories
- It is really easy with product photography to lose track of images – organize by product category and then specific product





Key Ideas

- ✓ Figure out what not to do by knowing why you're using social media
- ✓ Get specific about your goals
- ✓ Make a (simple) plan
- ✓ Plan in a group
- ✓ Adapt across platforms
- ✓ Use templates, save, label, and organize everything that you do





Thank you.

Questions?



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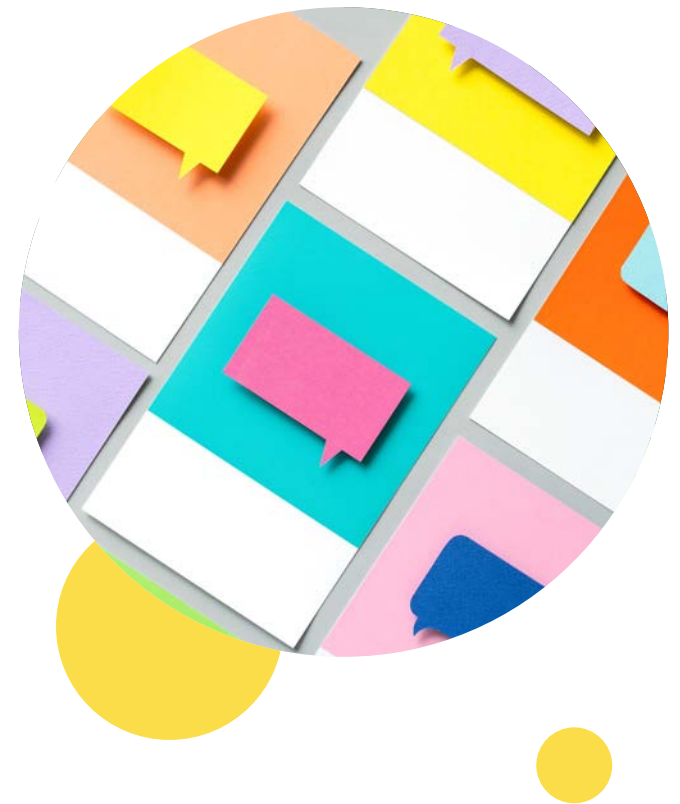
**SARAH BEST
STRATEGY**

Time Efficient Content Planning

Worksheets



Presented By Park Bank





If anything were possible....

We'd like social media to be doing what for our organization or movement?



Social Media Vision Statement

Mission:

Aspirations:

We are using social media to _____

It's important to us because:

_____.



What Are Your Boulders?

Too many hats

Not enough time

Not enough money

Always asking me to post stuff

We don't have clear goals

Platforms are sketchy

We lost access to our accounts

Efforts aren't coordinated

?



How Can You Scale Those Boulders?



S.M.A.R.T. Goal

- S – Is it specific enough for us to achieve? Do we need more info?
- M – How do you know when it's done?
- A – Is it achievable given our time, resources, etc.?
- R – Is it relevant to our vision or broader goals?
- T – When will we do it by?



S.M.A.R.T. Goal Worksheet

Name of your goal:

Specific:

Measurable:

Actionable or Achievable:

Relevant:

Timebound:



What Are Your Content Buckets?

Content Bucket	Question I'll ask when I'm planning



Content Topics

Content Bucket	Topic for this month



Six Key Questions to Ask During Planning Meeting

1. What's coming up this month?
2. What actions do we want people to do after they've seen our posts?
3. How do we know if they did that or not?
4. What events or timely issues are happening in our audience's lives this month?
5. What broader conversations are happening outside of our organization?
6. Who can help us get the word out this month?



Image credit: [VICE Gender Spectrum Images Collection](#)



Key Questions for the Month

Key Actions	Events / Timely	Events / Timely	Word Out?	Key Metrics



Content Calendar Worksheet

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY



What Can I Measure?

What Do I Want People to Do?	How Do I Know If They Did That?