

SOCIAL MEDIA PROMOTIONS CHECKLIST

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Objectives

- **What are the objectives?**

- Amplify brand
- New account opening
- Loyalty and retention
- Product development
- Thought leadership

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Timeframe

- **What is the anticipated promotion launch date?**

- Determine timing/type of promotion that can be implemented within timeframe
- Prepare a Time and Action Calendar
- Need to factor legal review, IS builds, QA and prize fulfillment into schedule
- Establish a date for taking the promotion down

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Audience

- **Who is the audience for the promotion? (Think about demographics)**

- Prospective Customer
- Existing Customer (1 time or repeat?)
- Internal/Employee
- Influencer

- **Technographics (Provide stats/articles)**

- Is audience currently engaging social media? Where?
- How does audience use social media (consume or create)?
 - Create content (via blogs, upload photos/videos)?
 - Post ratings/reviews/comments?
 - Participates but does not contribute? (Joins Twitter, FB, reads blogs)
- What content is most appealing to audience? (Quiz? App? Game? Survey? Refer-a-friend?)
- What type of prize will be most appealing to audience?
- If audience behavior is unknown, how can we confirm? (Need to purchase/conduct research?)

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Promotion Development

- **What type of promotion will you run?**

- Enter-to-win
- Instant win
- User-generated content

- **What is the desired behavior from the promotion?**

- Branch visit
- Email opt-in/Twitter follower/ FB fan
- Viral pass along (email forward, RT)
- Download
- Offer redemption

- **How does audience participate in promotion?**

- Dedicated microsite
- Facebook, Twitter, Pinterest, YouTube, etc.
- Email
- Mobile
- App

- **How will you integrate and drive traffic to your promotion?**

- Owned channels (web site, mobile apps, branch, statements)
- Direct
- Social platforms
- Paid social advertising
- Mass media
- Experiential
- “Shout out” influencer marketing
- PR

- **What is the length of the promotion? (24/7? Set length of time each day? Week long? Event-driven? Based on number of entries?)**

- **What is the plan for continuing conversation/engagement with participants throughout promotion period?**

- **What prizes will you award?**

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Program Administration

- Do you need an outside partner to assist with rules development, prize management and fulfillment?
- What are the costs associated?
- How much lead time is needed?

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Budget and Resources

- What are the budget parameters?
 - Consider prizes, agency services, technology needs, Program Administrator costs

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Reporting and Analytics

- What metrics will you track? How will you track/report?
 - Conversation volume (via Twitter, blog postings, comments)
 - Friends/followers/influencers
 - Contest entries
 - Downloads
 - Reposts/shared
 - Time spent on site
 - Return visits
 - Inquiries
 - Leads
 - New accounts

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Legal Considerations

- Review COPA regulations
- Review client's social media/web policies to ensure data collection/promotion does not conflict
- Ensure Program Administrator:
 - Drafts promotion rules, disclosures, terms & conditions
 - Coordinates registration and bonding with appropriate governmental entities and handling bonding issues
 - Prepares winner affidavits and releases
 - Submits winners list with appropriate governmental entities
 - Provides winners with 1099 tax forms

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Data Capture Protocol

- Determine how entry data – which may contain personal information – will be captured and where it will be housed
- Set strict protocols for access to customer data and transmission

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Interactive Support & Coordination

- Decide if promotion will be housed within an existing website or as a standalone microsite
- Determine if third party web hosting is needed
- Consider if the URL will be a sub-domain or promotion specific domain name
- Identify if mobile or responsive web design and programming are needed
- Ensure server can handle increase in traffic and is maintained to deliver constant connection with no outages
- Make sure server is secure
- Make sure user account, login system, and data collection is secure
- Safeguard against fraud and cheating
- Set timelines for how long the promotional pages will be up and align those with any scheduled web updates or releases
- Ensure analytics are put in place
- Set a timeline for destroying entry records

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Testing and Quality Assurance

- Review all advertising/supporting materials for promotion and make sure all messaging/instructions are clear and include any disclaimers
- Conduct functional review to eliminate bugs or technical issues
- Test in multiple browsers (use QA vendor, if budget allows)