Market Like You Mean It:

Using Digital Tools and Strategies to Improve Your Organization's Reach and Engagement

2018 Student Leadership and Diversity Conference

Feb. 3, 2018 • 11:55 a.m. to 12:50 p.m.

About Me

- Attended USC for my bachelor's degree in broadcast journalism, 2010-2014
- Worked in the Office of Student Media all four years, in various positions within The Daily Gamecock student newspaper including editor-in-chief
- Joined the professional staff in 2016 as the social media manager
- Duties include providing digital operations support and advisement to students involved with our four student-run organizations and two student-run support teams
  - Web and social media presence
  - Branding and marketing
  - Training and retention
  - Collaborative initiatives

Learning Outcomes

- At the end of this session, you'll be able to:
  - Apply basic branding standards and best practices to create a brand strategy
  - Determine what your organization's social media strategy should look like
  - Plan and execute social media marketing strategies for community-building, event promotion, and member recruiting
  - Navigate technology like social media scheduling tools and analytics data to support and measure progress toward goals
- Throughout the session, you'll apply the concepts we're learning to fill out a basic brand strategy. At the end, we'll discuss what you've come up with!

Branding 101

- Your brand is the overall perception other people have of your organization
- Establishing a brand helps people remember you and sets you apart from others, inspires connection and establishes your purpose
- A good brand is consistent, authentic, comprehensive, and unique

Determine Purpose, Position, Personality

- Brand purpose: Why does your student organization exist?
- Brand position: Who are you looking to reach, who else is trying to reach them, and how are you different?
- Brand personality: If your organization was a person, what kind of person would they be?

Establish Brand Identity

- The visual representation of your brand through your organization's logo, colors, and typography
- Does your current logo fit your purpose, position, and personality?
- Pick three colors: primary, secondary, neutral
- Choose one primary, versatile typeface with the logo and colors in mind

Create a Brand Style Guide

- Brand story: purpose, position, personality, plus historical information
- Logo: set guidelines for use in different environments
- Color palette: include exact RGB/HEX/CMYK values
- Typography: mix only contrasting fonts
- Visual language: animations, photography, patterns, icons, textures
- Brand voice: tone, style, do’s and don’ts

Social Media Strategy

- Determine purpose, target audience, current audience, goals
  - Recruit, raise awareness, distribute content
- What platforms support those things?
  - Twitter: in-the-moment; conversations
  - Facebook: longer shelf life; ad functionality; groups
  - Instagram: visual; opportunities for discovery; Stories
- Create an editorial calendar in Google Sheets

A	B	C	D	E	F	G
Week	**Network**	**Time**	**Content Type**	**Topic**	**Copy**	**Link**
WEEK 1					**WEEK 1: MONDAY, DATE**	
	FACEBOOK	10:00 AM	Curated Content	New Features	Infinite Snaps, loops, and a magic eraser? Woah.	http://ow.ly/DHev
		12:00 PM	Video	Music Resources	Don't risk your video being removed or your account killed. Here's the full list of free resources: http://ow.ly/zjkS30bHujZ 🎶	*(insert video file lin*
		3:00 PM	Promotion	Product Launch	Liftmetrix ➡️ Hootsuite Impact ✨ New name and offerings to help you measure and maximize ROI: http://ow.ly/tNx530bKIqN	http://ow.ly/tNx530
		5:00 PM	Live Video	News Update	A lot happened of social media updates happened this month. Let us know your reaction to these ones.	*(include CTA link)*
	TWITTER	5:45 AM	New Blog Post	Instagram Hacks	So, you think you know everything about Instagram? We bet you don't know these 44 hacks: http://ow.ly/aktF30c5d0O	http://ow.ly/aktF3
		7:15 AM	Curated Content			
		10:30 AM	Video			
		1:00 PM	Promotion			
		3:45 PM	Evergreen Blog Post			
	INSTAGRAM	7:30 AM	Original Image	Logo Cookies	Owl we want to do is eat these cookies. How many Owlys do you see? 👀	*(insert image file lir*
		9:45 AM	Curated Image	Owly Toronto	Psst... we opened a new nest in Toronto last week (and Owly is having a hoot of a time)! 📷: @taggio	*(insert link to origin*
		12:30 PM	Video			
		2:15 PM	Boomerang			
		5:45 PM	Story			
					WEEK 1: TUESDAY, DATE	
	FACEBOOK	6:00 AM	New Blog Post			
		9:30 AM	Curated Content			

Other Tips

- Do an audit of all your social media accounts and make sure they meet branding standards.
- Engage with your audience and share others’ content, too
- Square photos and graphics are more effective on mobile

Social Media Tools

- Scheduling:
  - Hootsuite
  - Buffer
  - CoSchedule
  - MeetEdgar
- Design:
  - Canva
  - Adobe Spark
  - Pablo, by Buffer
  - Desygner

Basic Analytics Data

- Audience:
  - Followers
  - Growth
  - Impressions
  - Reach
- Engagement:
  - Reactions/likes
  - Comments/replies
  - Shares/RTs/saves
  - Engagement rate
- Facebook Insights, Twitter Analytics, Instagram Insights
- DIY reporting template

Offline Marketing

- Distribute promotional flyers/posters
- Submit events to university calendar(s)
- Partner with other organizations
- Contact your student media outlets!

Major Takeaways

- Your brand is the overall perception other people have of your organization.
- Use your brand purpose to determine your marketing strategy.
- Always try to find a visual way to tell your story.
- Track specific performance metrics to guide your social media strategy.

Questions?

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MARKET LIKE YOU MEAN IT:

Using Digital Tools and Strategies to Improve Your Organization's Reach and Engagement

1. INTRODUCTION

A. Learning Outcomes and Activity Introduction/Instructions

i. At the end of this session, you'll be able to: apply basic branding standards and best practices to create your organization's brand strategy, determine what your social media strategy should look like, find tools that will help you create and manage content, and create an analytics reporting system to track your success.

ii. Use the worksheet at the end of this outline to apply the concepts and fill out a basic brand strategy.

2. BRANDING 101

A. What is a brand?

i. Your brand is the overall perception other people have of your organization, like a person's reputation

1. Based on how they feel when they encounter you
2. Can be defined by the organization, but it's truly determined by the audience
3. Serves as a promise to your audience about what they should expect

B. Why is establishing a brand important?

i. It helps people remember you and sets you apart from other organizations that may do similar work

ii. It helps to inspire connection with your audience. If they know who you are and know what to expect from you – and those things leave them with a positive feeling – they're much more likely to want to make that connection, whether that's by joining your organization, engaging with your organization on social media, attending one of your events, or donating money to your fundraising efforts.

iii. It can lend a sense of purpose and belonging to people who are already part of your organization. Additionally, a strong brand provides structure and context for future decision-making that serves your true purpose as an organization.

C. What are the main qualities of a strong brand?

i. Consistent
ii. Authentic
iii. Comprehensive
iv. Unique

D. What's the process for establishing a brand?

i. Establish your brand purpose, position and personality
   1. Brand purpose: Why does your student organization exist?
      a. *This is the "big idea" behind what you do. If you already have a mission or vision statement, this can be a variation of that. Keep it simple and memorable, but be specific.*
   2. Brand position: Who are you looking to reach, who else is trying to reach them, and how are you different from those other organizations?
      a. *For (target audience) who (statement of need), (organization name) is a (student organization) that (statement of key benefit/distinguishing characteristics).*
      b. *A little bit of research and gathering of data can be useful here. If you're having trouble determining your target audience, start by figuring out who your current audience is. To determine the statement of need for your target audience or the key benefits that would be most desirable, you may need to ask them!*
   3. Brand personality: If your organization was a person, what kind of person would they be?
      a. *List as many adjectives as you can, then pick the best 3-5.*
      b. *Think about what kind of "person" you already are, but also consider what kind of person would be best at accomplishing your brand purpose.*

ii. Establish your brand identity (the visual representation of your brand through a logo, colors, typography) and your brand style guide (system that guides how your organization is represented in images and copy).
   1. To prepare for this step, collect examples of ads, promotional graphics, social media messages and other organization communications that have worked well in the past and use those as inspiration. Collect examples of things that didn't perform well so you know what not to do, too!
   2. Does your university or division/department set certain branding standards for student organizations? Most institutions do have specific standards for their own logos, colors and typography, so you can sometimes use those as a starting point, depending on your organization's purpose/personality, for your own identity. If you're using any elements from the institution's style guide, like the university

logo, make sure you get approval from the appropriate offices (Trademark and Licensing, Communications) and aren't infringing on copyright.

3. Elements of brand identity: logo, colors, typography
    a. *Logo: Most of you probably already have a logo for your organization. As we discussed earlier in the presentation, constancy is key to maintaining a strong brand, so as they say: "If it ain't broke…" Even so, it's important to take a hard look at your current logo to determine if it fits with the purpose, position and personality you've established. Getting feedback from members of your organization can be helpful in figuring out what reaction your current logo elicits and how it could be changed for the better. Some principles: keep it simple and consider how it will look at all different sizes and in different media.*
    b. *Colors: You probably established at least one color for your brand when designing/revising your logo. To keep it simple at first, pick three colors: a primary, secondary and neutral. If you've decided that it's important to you to incorporate your university's colors, the institution's branding guide or visual identity system should be able to provide some ideas of what colors look best with those. Do some research on color psychology (blue is calming, red signifies passion, etc.) and think about the feeling you'd like your audience to have about your brand. Look at the competition and choose colors that stand out from the crowd.*
    c. *Typography: Identify a single, primary typeface. It should be relatively simple, something you can use in lots of different sizes and contexts. Does your logo incorporate text or letters? If so, try to find a font that complements the style, shape and weight of your logo, and that looks good in your color palette. It can be serif or sans serif, but think about the tone it conveys. Serif fonts tend to be more formal, elegant and classic, while sans serif fonts tend to look more modern. Sans serif also tends to be more readable in digital materials that can vary in display size. If you know you'll be doing lots of text-based marketing materials, go ahead and also identify a display font (this might be one that matches the font style in your text logo exactly/closely, an all-caps font, or something more fun). Ideally, your primary font will be versatile enough to use in body copy, but if it's not or you're creating materials with a lot of text that require headings and stuff like that, you can also find a very simple body copy font that complements your primary font and can be used in large chunks of text. If you're going to mix fonts in one document/graphic, they need to be significantly*

different. Mix only contrasting fonts, usually a serif and a sans serif, and try to choose fonts with similar letter heights (x-height).

4. Creating a brand style guide with six essential elements: brand story, logo, color palette, typography, graphic language, brand voice.
    a. *Brand story: This is a combination of the purpose, positioning and personality you established earlier. It can also include some historical information about your organization that can serve as guidance for brand decisions in the future and help educate new members.*
    b. *Logo: In addition to creating/revising a logo that fits your brand story, you need to set guidelines for how it should look in different environments. List minimum size and proper proportions, any protected space, any color variations that are acceptable, and major DON'Ts for using your logo. Make sure to show visual examples.*
    c. *Color palette: Show the 3-4 colors you've chosen for your brand and include the RGB/HEX or CMYK color values so there's no guesswork involved. You picked three colors for your palette earlier, primary, secondary and neutral. Consider adding a tint of one of these or a new, light color that you can use for backgrounds. If you want to designate which colors are used for different graphical, text elements, include that here. If text-related, also include in typography section.*
    d. *Typography: Make clear designations about which fonts/font families are used for which text elements – headlines, body copy, captions, section headings, etc.) – and include any rules you've established for text color here, too. Identify what alignment (left, right, center) should be used in general and for specific elements. Discourage extreme use of kerning (space between letters) or tracking (space between words) and in general, don't exceed 97-103 for kerning and -10 to +10 for leading.*
    e. *Visual language: A collection of graphical elements that will complement the logo style. Take a look back at the inspiration you gathered from past successful materials. Is there a common tone or graphic language (animations, photographs, icons, patterns, textures) you've used before that people associate with you, or would, if you were consistent about it? Incorporate your color palette into these elements.*
    f. *Brand voice: This is the style of writing and communicating you use when representing the brand. Look back again at the inspiration and examples you gathered from past work, and think about the adjectives you picked for your "personality." When that person talks, are they funny, sarcastic, serious or silly? Do they make pop culture jokes and use current slang, or are they more authoritative and informational in tone? This is a good place to address other standards for language,*

like style (AP, Chicago), or list words and phrases that shouldn't be used to describe your organization.

g. *Remember, the style guide is a working document that will evolve over time. Re-visit it regularly and make sure all your members, especially the ones that will be creating content or representing your brand publicly, are familiar with and know where to find it.*

3. SOCIAL MEDIA STRATEGY

A. Strongly consider establishing at least one person to solely focus on managing your social media presence, and make sure they understand your brand extremely well. Don't overextend your organization on social media. If your person/team is struggling to keep a profile active, don't create additional accounts until you've got the process for the ones you have down pat. Consistent posting and presence is the fastest, most effective way to build your audience.

B. Determine the purpose of your social media presence.

   i. Re-visit the brand purpose you established and determine how social media can support it. Do you need to recruit more members in order to accomplish your purpose? Do you need to connect with the public to raise awareness or money? Do you need to encourage members of your group to be more engaged and involved? Do you need to promote the event your purpose is tied to? Think about the big picture here.

C. Determine your primary target audience.

   i. This goes hand-in-hand with the needs you considered in the last step. Who are you talking to or trying to engage with? Do you need to reach people inside or outside of your organization or your university's community? Make this as specific as you can, based on your organization's purpose/mission. This can give a lot of insight into which platforms you should be on and what types of content you should be posting.

   ii. Don't forget to take stock of who your current audience is, especially if you're not exactly sure who you should be trying to reach. This can also give you an idea of how closely your followers line up with the ideal audience you want to have. Try to determine why those followers care about your content and what about what you're currently doing is working or needs to change to help you reach the right people.

D. Determine your goals for what your social media posts will accomplish and the problems they could help correct. You can pick more than one, but don't overdo it.

   i. This is like the smaller-picture version of your brand purpose. In the next period of time, what do you specifically want to accomplish?

      1. Recruit new members

2. Support and encourage current members
3. Raise awareness in the public/at your university
4. Raise money from the public/alumni/your university
5. Distribute content your organization has created
6. Crowd-source information/content from the community
7. Start conversations with the public/your university community/your members

E. Determine which platforms are your strongest or would be most effective to create. I'm going to focus on what I consider the top 3 (Twitter, Facebook and Instagram) but other platforms to consider are LinkedIn, Snapchat, and YouTube.

i. Twitter: Great for quick, in-the-moment messaging, live updates, and conversations. It's very important to RT and mention others.

ii. Facebook: Great for video because it's prioritized in people's timelines; posts stay in people's feeds for longer; incorporates most functionality that's available on other platforms. If you have money for it, Facebook ads are extremely powerful and offer a lot of data on how well they're working. Consider if a Facebook group could be effective for your purpose (great for internal community-building).

iii. Instagram: Emphasis on visual style and quality. Stories provide an additional entry point to your content and have super robust functionality for discovery. Location tagging is more used by profiles and followers.

iv. If you already have all three (or more) and you're effectively managing them all, think about how you can diversify your content so that different platforms offer different benefits to following them.

F. Determine the types of social media content that could support your specific goals.

i. Visual content is king on social media. Posts with images receive significantly more impressions and engagement, and video is far and away one of the most successful kinds of content on social media.

ii. Examples of specific content:

1. Member spotlight (video, graphic, Insta/Snap stories)
2. Behind-the-scenes of public-facing content or events
3. Feature someone affected by your organization's work
4. Live chat on related topic or information (great for Twitter or Facebook Live)
5. Live video of events or programming
6. Contests and giveaways
7. Photo albums of follower-submitted content
8. Influencer takeover (great for Instagram and Snapchat stories)

G. Establish a general schedule that you can keep up with for each platform and build an editorial calendar that shows it all together in one place.

i. Since tweets are so fleeting, consider establishing more frequent posting times for Twitter than you'll have on other platforms where posts have a longer shelf-life. (5-10 posts is recommended)

ii. The generally accepted rule of thumb for Instagram is to post once or twice a day. Now that the timeline algorithm is no longer chronological, post time-sensitive announcements at least 3 days ahead of the end of their relevancy. For stories, try to plan to include at least 5 posts.

iii. List all the different content types you'd like to include in your strategy and determine how frequently your social media person/team could plan for and create that content. Posting the same kinds of content at the same times on a daily, weekly or monthly basis can give you structure to follow in the beginning and establish patterns that your followers can count on and look forward to.

iv. Create a calendar in a Google spreadsheet to plan your posts. (refer to example) Once you establish a document and start using it, you can change it to better fit your specific needs. Assign specific people to specific tasks in creating this content.

H. Other reminders and tips:

i. Make sure you engage with your followers and people involved in your work/purpose/industry. Share others' content, not just your own, and have conversations with people! Consider turning on notifications for accounts that are particularly relevant to you, so you can stay updated in real time and share them immediately. This makes you more valuable to your followers.

ii. Do a social media audit and make sure all your accounts strictly follow your branding standards. Make sure profile pictures include your logo and cover photos are relevant. Make sure your bio or About section is up-to-date. Delete any old content that falls very far outside your brand or is just plain bad.

iii. Research has shown that square photos and graphics work well on Facebook and Twitter in addition to Instagram, because they take up more real estate, height-wise, in the user's mobile feed.

4. SOCIAL MEDIA TOOLS

A. Built-in scheduling tools

i. Facebook offers the ability to schedule or save drafts of posts automatically on business pages.

ii. Twitter allows users to save drafts of tweets, which can be opened and posted later.

B. Third-party scheduling software

i. Hootsuite: Probably the biggest name in the game. Offers built-in tools for bulk scheduling, multiple streams within the dashboard to monitor other profiles or

hashtags, built-in analytics, and link-shortening functionality. Choose times manually or "autoschedule" based on Hootsuite data.

ii. Buffer: Has a third-party integration for bulk scheduling, offers content curation tool, which is great for brands that don't create tons of content on their own, but want to stay relevant. Pick a subject and it will automatically give you a list of articles related to that with auto-generated messages that include the headline. Pick the ones you'd like to schedule and it will fill them in to a posting schedule that you set up yourself. Also offers link-shortening.

iii. Others to look at: CoSchedule, MeetEdgar (no free account options)

C. Graphic design tools – web-based, geared specifically toward social media graphics

i. Canva: includes a library of images, illustrations, type treatment options and templates with a simple, drag-and-drop interface, as well as the ability to upload our own elements and templates

ii. Adobe Spark: includes a library of templates, royalty-free images and preformatted text, as well as the ability to upload your own. Also includes tools to create simple web pages and videos (with templates).

iii. Pablo, by Buffer: minimalistic tool with fewer option for templates, a large searchable image library, up to three text boxes per design and one logo.

iv. Desynger: very similar to the others but has an extremely easy-to-use mobile app, so if you anticipate doing these things on-the-go a lot, this is a good option

5. ANALYTICS DATA

You've designed and implemented a strategy, but now you have to track the results. Otherwise, you'll never understand what works and what doesn't work and you won't be able to adjust your strategy to accomplish your goals. Track data on a timeline that works for your organization's workflow. If you meet weekly, track data weekly and share it with the leadership of your organization. At minimum, keep monthly totals.

A. Basic data to track

i. Audience data

1. Followers (or page likes, on Facebook)
2. Growth in number of followers/likes
3. Impressions: the number of times a post was seen
4. Reach: the number of individual people who saw a post (Twitter doesn't provide this data)

ii. Engagement data

1. Reactions/favorites/likes
2. Comments/replies/comments
3. Shares/retweets/saves
4. Video views
5. Negative feedback (Facebook only)

B. Built-in analytics tools

i. Facebook Insights: On a business Facebook page, there's a tab at the top called Insights. You can view data based on the categories of data on the sidebar or export data in Excel format.

ii. Twitter Analytics: Click your profile picture icon and select Analytics in the menu. Shows limited data for profile metrics, but the Tweets tab shows data for each tweet as well as averages for some higher-level metrics.

iii. Instagram Insights: only available to Business Profiles and within the app. At the very top of your profile page, tap the graph-looking icon to the right of your username. Instagram tracks profile data (followers included) on a weekly basis, so you'll need to go in and pull numbers on the same day each week to get an accurate look at that data.

C. DIY analytics reporting

i. I recommend tracking and keeping data in a central document so you can build up historical data to use in the future.

1. You can create a simple spreadsheet with summary data for each network and fill it in manually by navigating the Insights/Analytics areas to find the data you need. This is better if you choose to only track aggregate post data instead of the data for each individual post.
2. You can set up a slightly more complex spreadsheet that you can fill in with the exported data from Facebook and Twitter (still manual for Instagram). This is a better option if you're going to have a large volume of posts and want the ability to categorize posts so you can analyze data by campaign or subject. [Hand out analytics template instructions]
3. You can also split each platform into its own spreadsheet, which makes it easier to add additional sheets for analysis or charting

6. OTHER OFFLINE MARKETING IDEAS TO CONSIDER

A. Host events and programming alone and with other organizations on your campus

B. Post promotional posters on on-campus display and bulletin boards

C. Submit organization events to public university calendar

D. Make connections with and send press releases to your campus media organizations (consider buying advertising if you have the budget)

7. WRAP-UP AND DISCUSSION

A. Major Takeaways

i. Your brand is the overall perception other people have of your organization

ii. Branding is essential because it helps people remember you, sets you apart from similar organizations, and provides a sense of direction and purpose.

iii. An organization's brand style guide should include their brand purpose, positioning, personality, logo, color palette, typography, visual language, and voice.

iv. Use your organization's brand purpose to determine what social networks you join and what content you create.

v. Visual content performs much better than text-based posts. No matter what you're posting, try to find a visual representation of it!

vi. Create what you would like to see. In general, you're the audience you're looking to reach, so use that to your benefit.

vii. Track your social media performance so you know which parts of your strategy are effective and which parts you should revise. This can be as simple or complex as you have time to make it!

B. Questions? Email Sydney Patterson at patter28@mailbox.sc.edu!

CREATING YOUR BRAND STRATEGY

Brand: the overall perception someone has of your organization

1. WHAT IS YOUR BRAND PURPOSE?

This is the "big idea" behind what you do. If you already have a mission or vision statement, this can be a variation of that. Keep it simple and memorable, but be specific.

2. WHAT IS YOUR BRAND POSITION?

Use this template: For (target audience) who (statement of need), (organization name) is a (student organization) that (statement of key benefit/distinguishing characteristics).

3. DESCRIBE YOUR BRAND PERSONALITY.

List as many adjectives as you can, then pick the best 3-5.

4. DESCRIBE YOUR BRAND IDENTITY.

What does your logo look like? What colors are in your color palette? What typography will you use and when?

5. WHAT IS YOUR BRAND VOICE?

This is the style of writing and communication you use when representing your brand. Are there any words or phrases that shouldn't be used to describe your organization?

6. WHAT IS THE PURPOSE OF YOUR SOCIAL MEDIA PRESENCE?

Re-visit the brand purpose you established and determine how social media can support it.

7. WHO IS YOUR PRIMARY TARGET AUDIENCE?

Make this as specific as you can, based on your organization's mission.

8. WHAT IS YOUR MAIN GOAL FOR SOCIAL MEDIA?

Are you looking to recruit new members, raise awareness or money, start conversations with your audience, or something else?

9. WHICH PLATFORM IS BEST FOR YOUR ORGANIZATION?

10. LIST THREE IDEAS FOR SOCIAL MEDIA CONTENT THAT SUPPORT YOUR GOALS.

How To Set Up An Analytics Workbook in Excel

From the Student Leadership and Diversity Conference 2018 Educational Session: Market Like You Mean It: Using Digital Tools and Strategies to Improve Your Organization's Reach and Engagement

1. Open a new Excel workbook
2. Create sheets in your workbook that you'll just copy and paste raw export data into – Facebook post data, Facebook page data, Tweet data – and one where you'll manually input Instagram post data.
3. Create sheets for each social network. Fill in the left-most column with the time periods you'll be tracking data for – by month, week, etc. – and include the following columns for each network:
    a. Facebook: Total Likes, New Likes, Unlikes, Net Growth, Posts, Total Impressions, Total Reach, Reactions, Comments, Shares, Link Clicks, Photo/Video Views, Negative Feedback, Total Engagements, Engagement Rate
    b. Twitter: Total Followers, Net Growth, Tweets, Total Impressions, RTs, Replies, Likes, Profile Clicks, Link Clicks, Hashtag Clicks, Media Views, Follows, Total Engagements, Engagement Rate (if tracking monthly, include Profile Visits and Mentions, which Twitter only provides per month)
    c. Instagram: Total Followers, Net Growth, Profile Views, Website/Email/Get Directions Clicks, Posts, Total Impressions, Total Reach, Likes, Comments, Saves, Profile Visits, Follows, Total Engagements, Engagement Rate
4. Open Facebook Insights for your organization's page. On the Overview tab, top right, click Export Data. In the box that opens, choose the data type (we'll be using both page and post data); select the date range you'd like to see; make sure Excel is selected as the file format. Under Layout, open the drop-down menu and choose "Make New Custom Layout." Name your preset in the box on the bottom left. Add a sheet separator "Post Data" on the bottom right, and depending on which data type you're working with, choose the following columns to add under the sheet separator:
    a. Page Data: Lifetime Total Likes, Daily New Likes, Daily Unlikes
    b. Post Data: Lifetime Post Total Impressions, Lifetime Post Total Reach, Lifetime Post Stories, Lifetime Post Consumptions, Lifetime Total Video Views, Lifetime Negative Feedback
        i. Add an additional two sheet separators (one for "Engagements" and one for "Consumptions"). Drop the "Lifetime Post Stories by

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type" column under Engagements and the "Lifetime Post Consumptions by type" column under Consumptions.

After you've created a custom layout, select it under the Layout section and export the data for that date range.

5. Open the Excel sheet you just downloaded from Facebook Insights alongside the analytics workbook you created. Page data will already be in chronological order, just select all rows (leave out the descriptions of each metric) and copy/paste that into the Facebook page data sheet in your workbook. For post data, open the first sheet (Post Data) and sort posts by the date column from older to newer. The select all rows (not the descriptions) and copy/paste that into the Facebook post data sheet of your workbook. On the post data sheet in your workbook, add the following columns to the end of the sheet: Reactions, Comments, Shares, Link Clicks, Photo Views/Video Plays. Open the second sheet in your export (Engagements) and again, sort by date from older to newer. Ignore all the columns that are duplicated from the first sheet and focus on the three metrics measured as engagements – likes (reactions), comments, and shares. Copy/paste just the values into the corresponding columns you just created in your workbook's Facebook post data sheet. Open the third sheet in your export (Consumptions) and sort the posts chronologically. Copy the "link clicks" column into the corresponding column of your workbook, then do the same for the "photo view" column. If you posted videos, go back and fill in the blanks under "Photo/Video Views" with the number of video plays that are listed on the Consumptions sheet.
6. Now, you're going to fill in the formulas on the overview sheets so that it pulls the data from the raw data sheets. Make notes of the starting row (AAA) and ending rows (ZZZ) of the data for the time period you're pulling analytics for and fill in the following formulas with those numbers. NOTE: You can either type in the formulas as they appear below (remove brackets) and fill in the correct sheet names exactly as they appear, or, after typing = and your function (SUM, AVERAGE) in the formula bar, click the raw data sheet you'd like to reference and click and drag to select the data you want to use.
    a. Total Likes: Total Likes on the last day of the time period
        =('page data sheet name'![Total Likes column letter]ZZZ
    b. New Likes: Sum of new likes for time period
        =SUM('page data sheet name'![New Likes column letter]AAA:[same column letter]ZZZ)
    c. Unlikes: Sum of unlikes for time period
        =SUM('page data sheet name'![Unlikes column letter]AAA:[same column letter]ZZZ)
    d. Net Growth: New Likes - Unlikes

=C[current row #]-D[current row #]

e. Posts: Count of the number of posts in a time period
   =COUNT('post data sheet name'![Impressions column letter]AAA:[same column letter]ZZZ)
f. Total Impressions: Sum of the impressions for all posts in the time period
   =SUM('post data sheet name'![Impressions column letter]AAA:[same column letter]ZZZ)
g. Total Reach: Sum of the reach for all posts in the time period
   =SUM('post data sheet name'![Reach column letter]AAA:[same column letter]ZZZ)
h. Reactions: Sum of the reactions (likes) for all posts in the time period
   =SUM('post data sheet name'![Reactions column letter]AAA:[same column letter]ZZZ)
i. Comments: Sum of the comments for all posts in the time period
   =SUM('post data sheet name'![Comments column letter]AAA:[same column letter]ZZZ)
j. Shares: Sum of the shares for all posts in the time period
   =SUM('post data sheet name'![Shares column letter]AAA:[same column letter]ZZZ)
k. Link Clicks: Sum of the link clicks for all posts in the time period
   =SUM('post data sheet name'![Link Clicks column letter]AAA:[same column letter]ZZZ)
l. Photo/Video Views: Sum of the photo/video views for posts in the time period
   =SUM('post data sheet name'![Photo Views/Video Plays column letter]AAA:[same column letter]ZZZ)
m. Negative Feedback: Sum of the negative feedback for all posts in the time period
   =SUM('post data sheet name'![Negative Feedback column letter]AAA:[same column letter]ZZZ)
n. Total Engagements: Sum of the engagements already calculated on the current sheet (not the post data sheet)
   =SUM(I[current row #]:M[current row #])
o. Engagement Rate: Total engagements (calculated in previous column) divided by the total impressions, multiplied by 100 to make it a percentage.
   =(O[current row #]/G[current row #])*100

7. Log into Twitter and make note of your follower count in your Twitter overview sheet. Open the Twitter Analytics page (under profile picture icon in top right). If you're tracking data by month, go ahead and pull the numbers listed for that

month on the main Analytics page (new followers, profile visits, and mentions). Then navigate to the Tweets tab, select the date range, and export data.

8. Open the Excel sheet you just downloaded. Sort tweets by the date column in chronological order from oldest to newest, then select all of the rows with data and copy/paste it into the Tweet data sheet. Fill in the formulas on the overview sheet in the same way you did for Facebook, linking to the raw data. If you'd like to type in the formulas, make note of starting and ending row numbers and the column letters for each metric. Otherwise, type =, then the function (SUM, COUNT), then click the data sheet and choose the column/rows you need.
9. For Instagram, there's no data exporting option, nor do they keep track of historical data, so best practice here is to fill in the data manually on the same day each week. Open the Instagram post data sheet in your workbook. Manually add the following columns: Date, Time, Caption, Post Type, Impressions, Reach, Views, Likes, Comments, Saves, Profile Visits, Total Engagement, Engagement Rate, Hashtags. For each post in the time frame you're working from, fill in the data from the Instagram app. On individual posts, insights can be accessed by the "View Insights" button, drag up to see full data.
10. Open your Instagram overview sheet and, using the same process you used for Facebook and Twitter, build your formulas.