

Web 2.0 Plan for _____

The Social Tech Training was designed to build tactical skills, help develop vital support networks, and provide leadership skills and inspiration. We also aim to offer tangible take-home value by helping each participant create a customized Web 2.0 Plan for your organization.

The following Web 2.0 Plan outline will help you envision and plan how your organization will use the web to reach more supporters, further engage the ones you have, and ensure your organization is aligned and has the people and capacity for ongoing success. The sections in this plan are general categories; most should apply to you and we have covered most of the necessary ground. However, you will probably find that the various sections have differing relevance to your work. Please use this as a guideline, give us feedback on how we can improve it for future trainings, and above all take it in the direction you need to be of most value to you.

I: Organizational Purpose, Offering, and Audiences

The place to start all online projects: grounding them into the core of what your organization cares most deeply about, who it serves, and what it does.

Business Goals and Mission Goals

These are the business goals driving change (and keeping the executives up at night) at my organization:

These are the mission goals driving the purpose of my organization:

Strategic Plan

These are the 5 main priorities for my organization over the next 2-3 years:

Our Offering

These are primary products / services / solutions we provide to the world:

Target Audiences

These are the primary target audiences that are critical to our success, and that we need to serve with the web (include as much demographic, psychographic / behavioural info as possible):

These are the secondary audiences that are also part of the mix (but not the main target):

II: Participation Tools

The essence of Web 2 is participation: creating conversations with your audiences, and offering them an opportunity to meaningfully impact and help your work. Spending time with these core questions before moving straight to tools will ensure your social media project grows from the strengths your organization already has, and increase the probability that people will actually use the tools you create.

Participation Driver:

What content, tools, and relationships currently give people a reason to visit your site on a regular basis?

Participation Design:

*What are the mechanisms that **will** let people participate on your site? (ie. leaving blog comments, setting up a profile, “suggest a story” forms, social bookmark links.) List them from low to high impact.*

Participation Value Proposition:

What value do people get from visiting the site? What are the tangible and intangible rewards they get for contributing to the site?

Target Actions:

What are the top actions that you want your target audience to take? These should aim to strike a balance between allowing them to meet their goals with their visit while also meeting your business and mission goals for the site.

III: Content, Technology, and Design Requirements

If your Web 2 plan will require a major change to the content, design, or technology powering your current website or sites, the following categories will be important to answer. These are typically the “meat” of a website redesign project plan that a technical vendor or contractor would use to create a new site.

Content Plan

What new content needs to be created to appeal to our target audiences and meet our business goals? Where will this new content come from?

Information Architecture

What is the new information / story structure for your site? The most sophisticated IAs use labeling that is descriptive (ie. you don't want your user to think: “What does that mean?” or “where does that go?”), is consistent (ie. doesn't mix topic, task, and audience), uses the language of your target audience, and tells the story of your organization in the IA itself. Information Architecture is a science - so don't expect to nail it on your first try!

Functional Specifications

The things that your target audience will need to use in order to reach their goals. Typically a list of technology features written in plain English. Typical functional specs include “A Content Management System to enable 3 people in 3 offices the chance to easily update content on the site”, or “A Blog aggregator to take 4 blog feeds on 2 different sites and combine them into one page on the main site.”

Design Direction:

The objectives that need to be achieved with a new site design. The story, emotions, and brand attributes to be communicated. Finally, the tactical details of what needs to be designed (ie. home page, standard inside page template, custom Donate page, custom Press Room page, e-newsletter template, banners and badges, Facebook Widget, etc).

Community Management Plan:

Key questions relating to the management of and responses to user-generated content:

- Response plan - how quickly will you respond to user questions or comments? Will you track responses in a CRM?

- Crisis communications - what will you do when someone says something critical about you work / your org / your leaders?

- Privacy - how will your site be compliant with national privacy regulations? Are there any specific reasons why your organization requires more stringent regulations?

- Resources - will you use any volunteer or member resources to support community publishing? How will you manage them?

Internal Management Plan:

How much additional time will be required to successfully publish, promote, and manage your new online tools? How can this additional time requirement be justified to the people who establish budgets in your organization?

Additional Ideas: