



## Appendix J: Social Media & Marketing Worksheet

### Primary Goal

Identify the main goal of your social media and marketing efforts. Specifically, define your target population and desired outcome. Your primary goal will be the basis of your entire strategy. Guiding questions:

- Who do you want to reach?
  - Be as specific as possible. It is not sufficient to say 'academic community' or 'researchers' - Do you want to reach those based in a specific country, the South Asian region or the entire world? Do you want to reach social scientists, health researchers, community- or hospital-based clinical researchers?
- What do you want to accomplish?
  - Dissemination: Communicate research findings
  - Recruitment: Find collaborators, members or participants
  - Visibility: Promote work and raise your profile
  - Career development: Attract the attention of employers
  - Documentation: Maintain a timeline and record of your activities
- What does success look like?

[Draft the primary goal here]

### Team & Resources

Identify the team members that will work on social media and marketing activities, and define their roles and responsibilities. Outline the resources and materials available to the team to carry out activities. The availability of people and resources determines what is possible to achieve with your social media and marketing activities - e.g. if there is only one person spending an hour a week on social media, it would not be wise to try to be on three different social media platforms and trying to put out various types of posts (infographics, text, images, video).

Guiding questions:

- Who is responsible for creating and updating this strategy?

- Who is involved in content creation?
- Who is responsible for posting content?
- How much time can be allocated to social media and marketing activities by different team members?
- What resources are available for content creation and posting content?
  - Financial: Research or other funding to pay content creators or subscriptions (e.g. X Pro)
  - Institutional: Photographers, video studio, marketing department
  - Graphics & Design: Canva Pro, Piktochart, Easel, GoDaddy Studio, Adobe Photoshop
  - Social Media Growth Tools: Tweet Hunter, Hypefury [to help grow your audience]
  - Social Media Listening Tools: Brandwatch, Hootsuite [to help with market research]
  - Other: Grammarly, Mailchimp, Cameras, Recorders, Analytics Tools

[Draft a description of your team and resources here]

## Social Media Platform(s)

Select the social media platform(s) you will use. This should be informed by your audience, goals and resources, as well as the type of content you are planning to create. Starting with a single platform is preferable to using several at once. Content can rarely be simply copy pasted from one platform to another, as each platform has different styles, limitations (e.g. word count, video duration, preferred image size) and audiences. Expansion to other platforms can occur once your team has experience of managing social media and marketing. Remember that you do not necessarily have to create and maintain a profile on each platform - e.g. the institutional LinkedIn account can post on your behalf.

Potential platforms:

- Blogs: Great for storytelling and longer articles describing research in detail. Not good for networking.
- LinkedIn: Enables professional networking and sharing of resources as well as visibility for an individual and institutions. Not widely used by health researchers or clinicians.
- Facebook: Groups are an effective way to reach people and communities. Users are primarily older.
- TikTok & Instagram: Primarily visual platforms focused on entertainment. Younger audiences.
- Twitter: Used to be the main platform for academics. Posts with links are now deprioritised.
- Bluesky: New excellent alternative to Twitter, no adverts or monetization. Currently, limited reach.
- YouTube: Brilliant for storytelling and longer videos, and hosting a record of activities.
- Research Gate: Focused on science and researchers. Great for sharing publications.

[Draft a description of the platform you will use and the rationale for using it]

## Marketing Activities

Consider other types of marketing activities aside from social media. Use of these will likely vary over time and with different projects, but if they are used, it is good to plan resources and consider how they will be used.

- Printed materials: Posters, advertising leaflets, standees, physical signs
- Newsletters: Physical, email or online on a website, frequency, type of content
- Website: Subpage within your institutional website, standalone website
- Legacy media: Institutional or local radio, newspapers, media, press releases, contacts within media

[Draft a description of the activities that will be used and how]

## Branding

Branding is absolutely key to ensure that you or your group is easily findable and recognisable. Effective branding helps with content creation, engagement with audiences, networking and visibility. When establishing your brand, it would be useful to conduct some market research to see what types of individuals or brands already exist in your field to ensure your brand offers something new or additional, what tone of voice or content your intended audience responds to and what previous strategies have or haven't been successful?

- What is the name and account names you will use?
  - Make yourself easily findable: Short, simple, unique and professional. Shorter names are easier to tag and work better on platforms with word limits. Do not use things like Timo1991.
  - Ensure the name reflects your brand: @NeuroNayeem for Ahmed Nayeem interested in neurology
- How would you like others to describe you? How would you like to come across? What is the tone of your voice? [Some examples below]
  - Funny: Engaging and entertaining, putting out fun memes and videos, attracting a wider audience
  - Authoritative: Leading voice in a specific topic, professional, sharing articles, attracting specialists
  - Critical: Challenging and critiquing publications and views, attracting debate and engagement
  - Inquisitive: Curious, asking lots of questions, posting polls, engaging with a wide variety of material
  - Encouraging: Commenting on lots of post, congratulating the work of others
  - Positive & Exciting: Use lots of emojis, share lots of new material.
- What are your key messages, slogans and terms?
  - Consider a few key messages or terms that you keep repeating in your materials
  - For example, 'the first-ever public engagement group in Pakistan' is a recognisable slogan that can be used together with key terms such as 'collaboration', 'patient-centered' and 'novel'
- Do you have a logo? What is the colour scheme you will follow?
  - If your logo has the colors black, white and red, all your marketing materials should adhere to this colour scheme including infographics, posters, presentations and adverts
  - Its a good idea to define the RGB & HEX codes for your brand colors to help with content creation.

[Draft a description of your brand, including the tone of your voice and your public image as well as key messages, slogans and brand colours]

## Content

Content creation and posting can be time-consuming. Planning content ahead of time and scheduling posts ahead of time will save the team a lot of trouble. All social media posts are a form of publication and leave a permanent record. Therefore, you do not want to make mistakes or publish something you may regret later. Remember that ideally only 20% of your content should directly promote your brand. The other 80% should be dedicated to audience interests and involve things like commenting and resharing the content of others. Market research will also help here to find out what your target audience engages with, what hashtags and terms to use, etc.

- What type of content will you post? e.g. memes, pictures, text, video, infographics, publications, blogs
- What do you already have? e.g. headshots of team members, event pictures
- How often and when will you post?
  - This should be guided by your platform and audience. If you are targeting South Asian researchers on Twitter, it is best to post weekday mornings or lunchtime.
- Will you use a scheduling tool or post manually each time?

[Draft a description of the type of content you will create and the practicalities of creating and posting the content]

## Monitoring & Evaluating Progress

To ensure you are progressing towards your stated goals and your marketing strategy is working, it is important to determine the way in which you will be monitoring and evaluating progress.

- How will you measure success or failure?
  - Increased traffic to your website & downloads of your publication or newsletter
  - Number of new members, participants, colleagues or collaborative projects
  - Increased number of citations for your paper or mention of your group on social media
  - Followers and likes - These are often called vanity metrics as they do not reflect actual engagement
- How often will you evaluate progress and how will you evaluate?
  - Successes & challenges: Identifying what has and hasn't worked with content creation, posting, teamwork, processes and timing.
  - Engagement: Reviewing the types of content people have most engaged with.
  - Timing: Quarterly, 6-monthly or annually. Consider doing a smaller review more frequently and a deep dive into your social media strategy annually.

[Draft a description of your monitoring and evaluation plan for the marketing strategy]

## Further Resources

The following blogs and resources may be helpful when considering your social media and marketing strategy

- Starter Guide: [www.lib.sfu.ca/help/publish/scholarly-publishing/radical-access/twitterforacademics](http://www.lib.sfu.ca/help/publish/scholarly-publishing/radical-access/twitterforacademics)
- Twitter for Academics: [onlineacademic.wordpress.com/social-media-for-academics/twitter-for-academics/](http://onlineacademic.wordpress.com/social-media-for-academics/twitter-for-academics/)
- Social Media for Research: <https://researchimpact.ca/webinar/social-media-strategies-for-research/>

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Social Media & Marketing Worksheet

Page 4 of 4

