DON'T PANIC!

SOCIAL CONTINGENCY
FOR SMALL TEAMS

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WELCOME TO THE SOCIAL MEDIA CONTINGENCY PLANNING GUIDE!

The last few years have been a LOT, and you've probably had people change jobs, get sick, or move away. When you use social as part of your communications plan, it can be nerve-wracking to think about what might happen in an emergency, so now is the time to start creating a contingency plan!

Before we get started, let's look at what a good contingency plan includes, shall we? I typically encourage:

- Documentation of your social media processes.

- The training a backup in your organization to be able to write, post, and schedule content and manage comments or queries through social channels.

- The identification of at least ONE other person who can be attached to the accounts with admin access (like Facebook or LinkedIn) and provide them with access to your passwords for single-sign-on channels (like Twitter or TikTok) as well as access to the email associated with your social program.

Throughout the guide, I'll speak to you (the person reading) as if you are the social manager for your organization. If you aren't - and are someone who manages them - that's great! I'm so glad that someone outside of the social media person on your team is concerned about contingency planning.

If you are a social media person or the "wears all hats, which includes social" person, please don't try to do this all at once. Please take it in stages, and don't expect to bang this all out in a week.

If you are the manager of the social person in your organization, know that your social person is handling a lot. So please don't throw this on their plate with the expectation that the contingency plan can be finished in their spare time. This is essential work and should be treated that way.

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Wait! I'm a Soloist or Freelancer! What about me?

As a soloist who manages all their own marketing, I know that we need contingency planning as much as larger organizations, because I've lived through my own various emergencies!

Throughout this guide you'll find boxes like this one with the star in them, that talks about how you can adapt the advice to your work.

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1 SPELL IT OUT

Step One: Document your social media processes.

You can't teach what you don't document. Take it slow to make sure you capture everything!

First up in your process document should be the following three things. If you do NOTHING else in your social contingency plan, document them! They will be the most helpful items in an emergency:

- Social Accounts & their passwords (+ a list of who has access – see Step 3 for more) and any usernames/passwords for supplemental accounts (Canva, Adobe, etc.).
- How to post and schedule content. Think granularly here and write it out step-by-step. It helps if you write out the steps while posting and scheduling content. As you post or schedule, write out each discrete step you take.
- How to respond to comments, questions, and direct messages. You also get bonus points by including draft responses for frequently asked questions.

Videos can be your friend here! I have client who was a visual learner, and written instructions were frustrating, so I found using an app like Loom while you do a "post and voice walkthrough" can also be helpful!

Next, you can move on to supplemental information. These are guidelines that can be helpful if your content create is out for a long period of time, or can't do a post during an emergency.

- Where to find your content calendar. (It's in a shared drive, right?)
- How to write a post for your organization. This can include things like "we refer to our process as being on a journey" or "if we use acronyms, we always include the meaning in a parenthesis," but it can also include words you never use or words you always use. It's good to include hashtags you use or hashtags not to use.
- Ways to create graphics for a post. If you have a graphic designer (lucky you) this is less important, but if you are a D.I.Y team, it's key. Include dos & don'ts for sourcing photographs and illustrations and your standards for alt-text. If you have an organizational Canva account, pre-loading your branding and templates and writing out how to access this will be helpful!
- The content distribution plan or flow. Do you have a specific type of post that only goes on Facebook? Do you cross-post your Reels to Twitter or LinkedIn? If those details are essential to your organization, include a section on content distribution flow.

1 Solo friends: At the very least, documenting all your accounts & passwords is important. Consider creating an "emergency" post in case something happens to you and you can't do what you do, and give it to a trusted person. Example: my husband has my accounts + passwords, and a short message in case something were to happen to me.

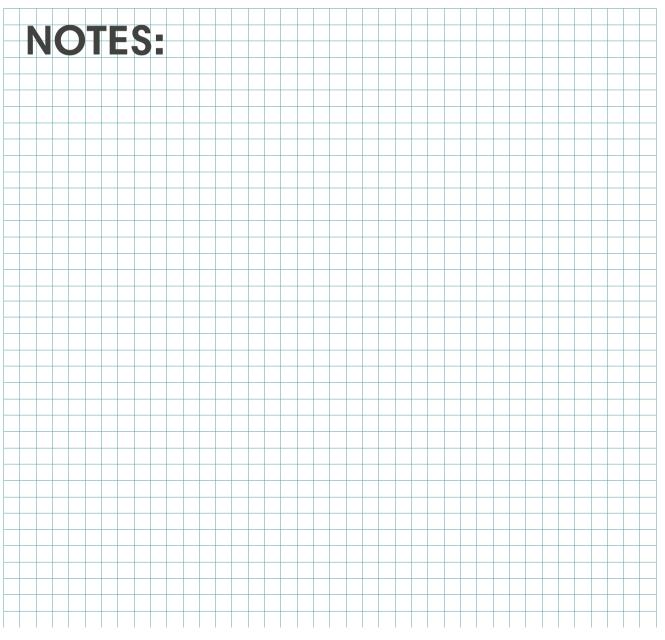We almost had to use it too, when I broke my ankle in May of 2023.

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1 SPELL IT OUT

(CONTINUED!)

If you've gotten this far, you'll notice what we have here – it's a manual for social media at your organization. Once you've finished it – congratulations! It can take time to do, but it can be essential to ensure your organization isn't caught unprepared. You've created something that not only helps you (the social media person) and your team, but the organization as a whole!

I recommend scheduling time at least once a year (ideally every six months) to update your manual & videos to make sure it's up to date.

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2 GET A BACKUP

Step Two: Find Your Backup

Once you've documented your processes, train one person in your organization to write, post, and schedule content, and manage comments or queries through social channels. This person can act as a backup if the social person can't be there in an emergency, OR this person can act as a relief if the social person needs time off. Ideally, this person is both.

Your mind may go to the PERFECT PERSON to act as your backup, or you could be looking at this step and going, "Ugh, there's no one."

Both reactions are typical, and finding someone may be easier if you think about these two things:

- Whether they are a TikTok Queen, run social channels as a volunteer for someone else, or if they are only on Instagram to share photos of their kids, you STILL HAVE TO TRAIN THEM ON YOUR ORGANIZATIONAL PROCESSES. Running a business account is different than posting to a personal account, and every organization is different. Taking the time to train someone is the difference between having a successful contingency plan and crashing & burning.

- Be clear about expectations for the backup person. Work with the backup & their manager about how this will work. Since the backup person is ideally someone who can help during an emergency when the social person can't be there OR when the social person is taking a much-needed break, make sure to discuss & outline what each scenario looks like. Examples can include "I'll make sure to loop you into my vacation schedule, Jeff, and we'll meet a week before to make sure you know what needs to happen" and "In the event of an emergency, if I cannot make a post, Diane will contact you, Jeff and let you know that you need to take over for _____ amount of time."
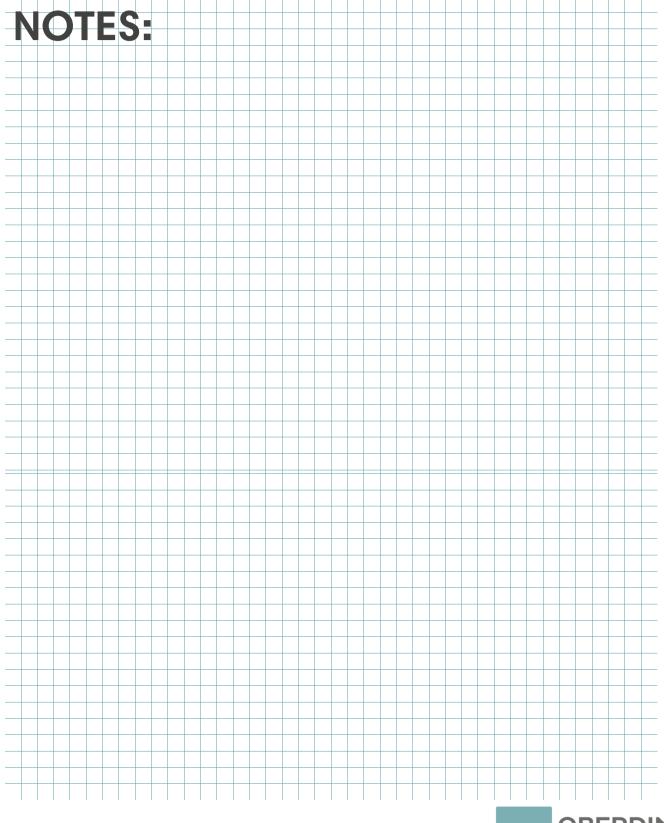
I recommend always finding a backup who is employed full-time at your organization, plugged into what your organization does, and is a good communicator across the organization. If you are a nonprofit, it can be TEMPTING to use volunteers, but I don't usually recommend it. In some cases, I will act as backup for my clients - so that you can look for a consultant or Virtual Assistant, but I only recommend this if they are already working with you.

> **1** Solo friends: First, if you're going on vacation, or are really sick, and you don't provide customer service via social, JUST TAKE A BREAK. It'll be ok, I promise.
>
> If you do use social to provide customer service, or use it to talk to clients, having a pre-created message that you can pull out in case of emergency can be helpful. Transparency can go far in situations like this. Be honest! (Also, dig into where you can create autoresponders on your social to help you cover your messaging).

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2 GET A BACKUP

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③ ACCESS IS KEY

Step Three: Administrative Access

Identify three people at your organization who can be attached to the accounts with admin access (like Facebook or LinkedIn) and provide them with access to your passwords for single-sign-on channels (like Threads or TikTok) the email associated with your social program.

Since you already made that list of all your accounts in Step One, now you get to determine who would be appropriate to have access to the social channels that require admin access. Specifically, we want to look at your Facebook page/Meta business accounts and LinkedIn company pages and assign at least 2 trusted individuals with administrative access. This should include your backup person and ideally one other individual.

To pick your other individual (or individuals), look at leadership in your organization. If you are small enough, consider your Executive Director or a second person in administration (Director of Communications or Director of Development, for example). If your organization is more extensive, you can look at the Leadership team or the second level down. The key is to pick people who are likely not to leave or to wreak havoc on your accounts if they do.*

Remember - the people who aren't your direct backup and have administrative access are there as a failsafe for the organization. They shouldn't be focused on posting or needing to post.

Why is this important? I've met with so many clients who lost access to their social accounts because only one person had access and they used a personal email address, and by the time they engaged me to help them, there was no way to recover the account. This is what the extra administrative access individuals are for – organizational backup, not posting backup.
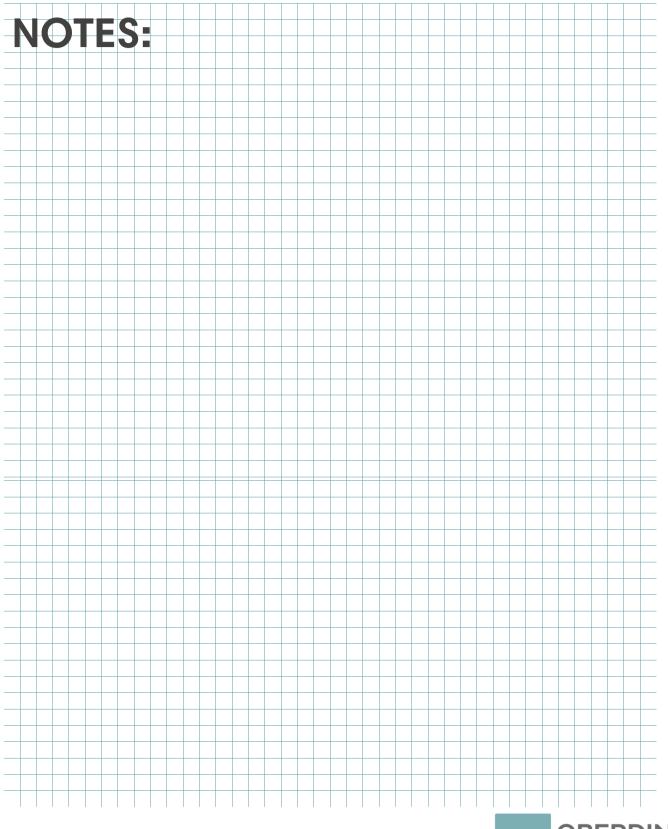
*If they leave, make sure part of their offboarding process involves revoking admin access and updating passwords.

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1 Solo friends: Administrative access is less important for us, as we are not likely to leave our own organizations and then lose our own LinkedIn passwords, but if you work with contractors, virtual assistants or others who get access to your stuff - make sure when the relationship is over, YOU have an offboarding process that revokes their access, and that you change your passwords when you end the contract.

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③ ACCESS IS KEY

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The End.

So there you go—three steps to creating a contingency plan.

If you feel overwhelmed, it's OK. Start slow. Step One is long for a reason – it both helps you get your ducks in a row and gives you time to think about who would be best to help you as a backup (Step Two) and who can be an organizational failsafe (Step Three).

Before diving into the actual documenting process, take a few minutes to write down a project plan for how you might attack creating your contingency plan. Look at your calendar – find a natural break in your year – and plan to work on the bulk of it then. I do NOT recommend trying to do this while in the middle your busy season!

1 Solo friends: You might be feeling some feels too! Your contingency plan creation may be smaller, but you may be thinking about What Might Happen If Everything Goes Wrong And I'm On My Own. It's normal. If you've learned anything by reading through this, I hope its that by applying a contingency planning mindset to your marketing, you see ways to plan for emergencies too.

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