



# are you frank?

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are you being:

real,  
honest,  
authentic,  
transparent,  
inviting,  
collaborative,  
trusting,  
and in rich,  
regular conversation

**with your best customers, your co-workers,  
maybe even yourself?**

# requests today

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## ▶ **input:**

- Of those STEPers who have implemented social media what have been your biggest challenges: technically, organizationally, culturally, other?
- To whom would the 'frank / inside' overview and toolkit be of most use: business leaders, IT, training & organization effectiveness, other?

## ▶ **feedback:**

- **Today:** What's missing from the toolkit?
- **Post-STEP meeting 'test drivers':** Would you (or someone you know) be willing to beta test some or all of these tools?

# what is frank / inside?

## Technology-Neutral Social Media Methodology & Downloadable Toolkit

+

## Online Community

### **Spring 2009:**

- “A la carte” downloadable tools & templates for license
  - individually
  - in packages
- Social media, organization effectiveness and branding consulting services
- Webinars, workshops, frankosphere meet-up events

### **Fall 2009:**

- Online interactive tools, templates
- Community development manager certification

### **Spring 2009:**

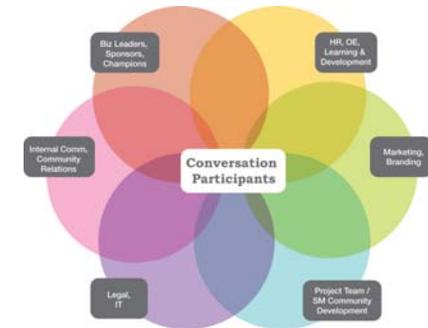
- Open “basic” membership includes:
  - blog
  - free articles, podcasts, tools
  - “practitioner question of the week” discussion threads
  - member profiles with expertise tags
- Downloadable tools for purchase

**Fall 2009:** *membership levels, pricing structure to be re-evaluated*

# who might benefit from frank / inside?

## Anyone who is:

- ▶ considering a social media implementation *and* who wants to:
  - determine the right social media for the organization's culture
  - work effectively with their technology organization
  - minimize legal, hr, tech team and community resistance
- ▶ interested in measuring social media's value to their organization
- ▶ seeking more online conversation participation and organizational alignment



# why frank / inside?

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1. **“One stop shop”** for practical how-to tools and tips, many of which are free. Tools are “a la carte”: buy as many or as few as you need.
2. Includes both **strategic perspective** to align social media to business needs and also **practical, tactical tools** for implementing.
3. Addresses the **diverse** needs of social media project teams, including technology, change management, business rationale, legal, branding and others.
4. **Holistic cross-functional implementation methodology** increases chances of project success.
5. **Technology-neutral** toolkit assists organizations with successful implementation – no matter what their project scope or platform.
6. **No “one” expert** drives frank / inside: it includes an entire online **community**.
7. Toolkit is **constantly evolving** based on community input: it **will stay relevant** to your needs.

# frank.

authentic branding + organizational  
courage through social media



frank.  
inside  
home

What's Social Media?  
Web 2.0?  
Enterprise 2.0?

Is social media right  
for my organization?

How do I measure  
social media's  
impact?

How do I  
get started?

Where can I find  
(preferably free)  
tools & resources?

## frank fact:

You can't build  
a 2.0 business  
with a 1.0  
mindset.

Open, honest conversations. Individual expression. Leadership transparency. Co-creation and collaboration. With ideas like these evolving the business world, organizations face new opportunities and game-changing challenges like never before.

So how do you navigate through this within your organization? What are the best strategies to identify, deal with and push beyond internal barriers? And why should you build a 2.0 initiative that sticks? Join the frank / inside community to learn all this – and more.

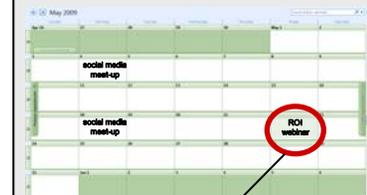
✉ forward

search

Check out frank's social  
media definitions --  
or add yours!

Think you know  
your social media?  
Take the quiz!

July 2009



Registration open!

sign in  
[Forgot your password?](#)

0 item(s) in cart

rotating  
social media  
facts,  
quotes,  
news items

### mildly frank // the blog

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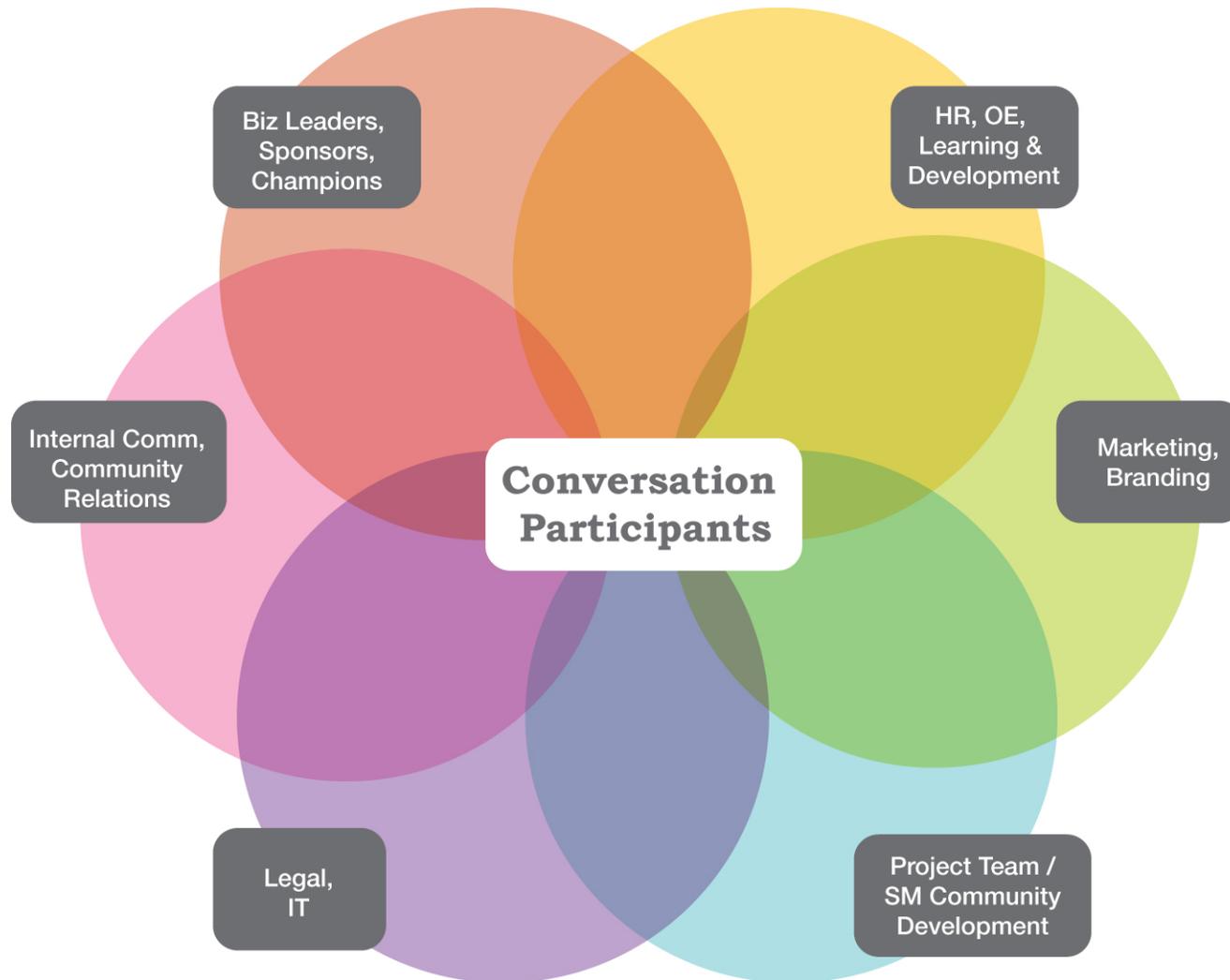
[social media toolkit](#)

[site map](#)

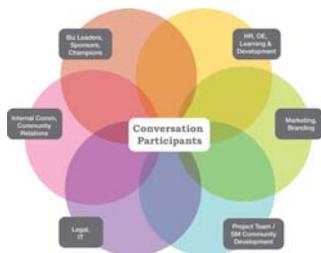
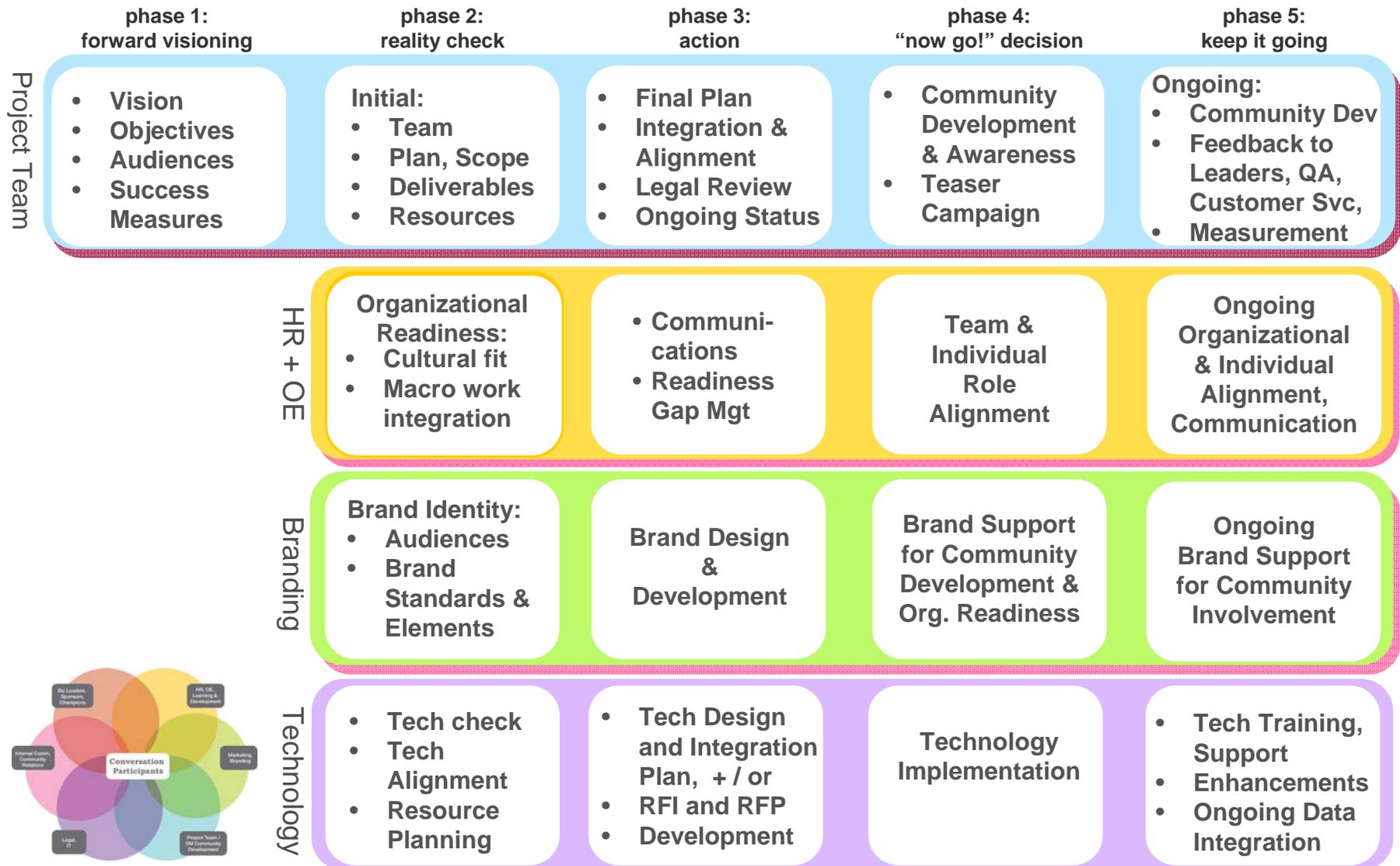
[help](#)

[contact frank](#)

# recap

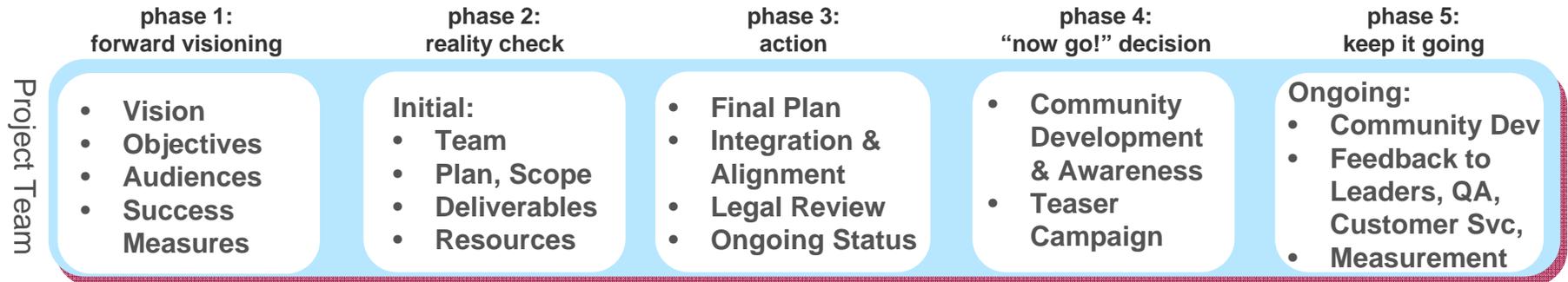


# methodology road map



\* Downloadable social media implementation toolkit available June 2009 at [areyoufrank.com](http://areyoufrank.com). Many tools and resources will be free. Check out our preliminary stuff on [www.BizBehindTheBuzz.com](http://www.BizBehindTheBuzz.com).

# phase 1 - forward visioning - topics



- **Assessment:**  
Organizational + Web 2.0 Culture Fit
- **Biz Rationale**  
Worksheet
- **Audience**  
Analysis Data Collection
- **Initial Tech**  
Considerations
- **Project ROI**  
Overview + Process
- **Kickoff Meeting**  
Agenda, Team Roles
- **Sponsor Role +**  
Communications Worksheets
- **Legal**  
Considerations

# p1 Detail

## phase 1: forward visioning

Project Team

- Vision
- Objectives
- Audiences
- Success Measures

- Assessment: Organizational + Web 2.0 Culture Fit
- Biz Rationale Worksheet
- Audience Analysis Data Collection
- Initial Tech Considerations
- Project ROI Overview + Process
- Kickoff Meeting Agenda, Team Roles
- Sponsor Role + Communications Worksheets
- Legal Considerations

Tool #	Task / Tool	Description
P.0	How to use this toolkit	General overview and FAQ's introducing frank / inside and how to use it.
P.1.0	phase 1 overview and gate criteria	description of the first / "f" phase - what to expect, how to know when it's done.
P.1.2	organization culture assessment	an overview of visual and behavioral cues for identifying an organization's culture (and whether that culture is a good match for social media)
P.1.2.1	organization culture quiz / planning sheet	quiz for determining the "fit" between an organization's culture and social media. Debrief sheet includes feedback and "next steps" planning
P.1.3	kickoff meeting agenda	agenda and setup tips for helping the client lead the project kickoff meeting: whom to invite, agenda items, key outcomes
P.1.3.1	business rationale worksheet	interactive worksheet assisting project team in creating a business rationale for project cost justification
P.1.4	project charter and steering committee	project charter template setting baseline for scope, roles, deliverables
P.1.4.1	stakeholder map	an overview of key audiences, their relationship to the project and level of support they'll need to manage change.
P.1.4.2	project charter detail	detailed project overview that establishes a baseline for project change control
P.1.5	key project roles	list of important team roles for any social media implementation project. Different roles for different project scopes. Checklist for defining this particular project's team.
P.1.6	audience analysis / defining the community to engage	questionnaire that helps the client articulate the demographics and psychographics of each key participating audience
P.1.6.1	audience analysis summary	summary of audience analysis, provides outline of key talking points for communicating impacted community.
P.1.6.2	conversation structure guide	brief description of different types of communication, and how to match the media to the message / communication
P.1.7	initial tech check	a list of functional and technical considerations to ensure that the client organization has the ability to implement successfully
P.1.7.1	initial tech inventory	list of questions to assist the client in determining what architecture is available to support social media
P.1.8	social media tactics / priorities	an overview for identifying social media's critical success factors, and prioritizing social media tactics based on those characteristics
P.1.9	tech check - technical design questions	list of questions to assist the client in determining the optimal technical design for a portal solution
P.1.10	sponsors, champions, project team, allies: ID'ing your leaders	an overview of the different types of leaders, each of whom will be critical to project success
P.1.11	vendor criteria / checklist	while the project functionality will drive specific vendor requirements, this will help the client to determine 'baseline' vendor criteria (solvency, expertise, etc.)
P.1.12	project outcomes and measurement	strategic approach for measuring social media success. Questions for aligning biz and project measures.
P.1.13	project plan, timeline, budget, status updates	documents and / or system for the project manager and traffic control to keep the project focused on success, on time and on budget.
P.1.14	project team success measures: celebration, reward / recognition	list of considerations for retaining project team members through reward and recognition (for long-term projects)
P.1.15	project summary worksheet for sponsor communication	"cheat sheet" for project leaders to create an "elevator speech" of key talking points for sponsors
P.1.16	sponsor role and 'to do' checklist	an overview of the sponsor role. This is a checklist to help the project manager determine if the sponsor is the best fit.

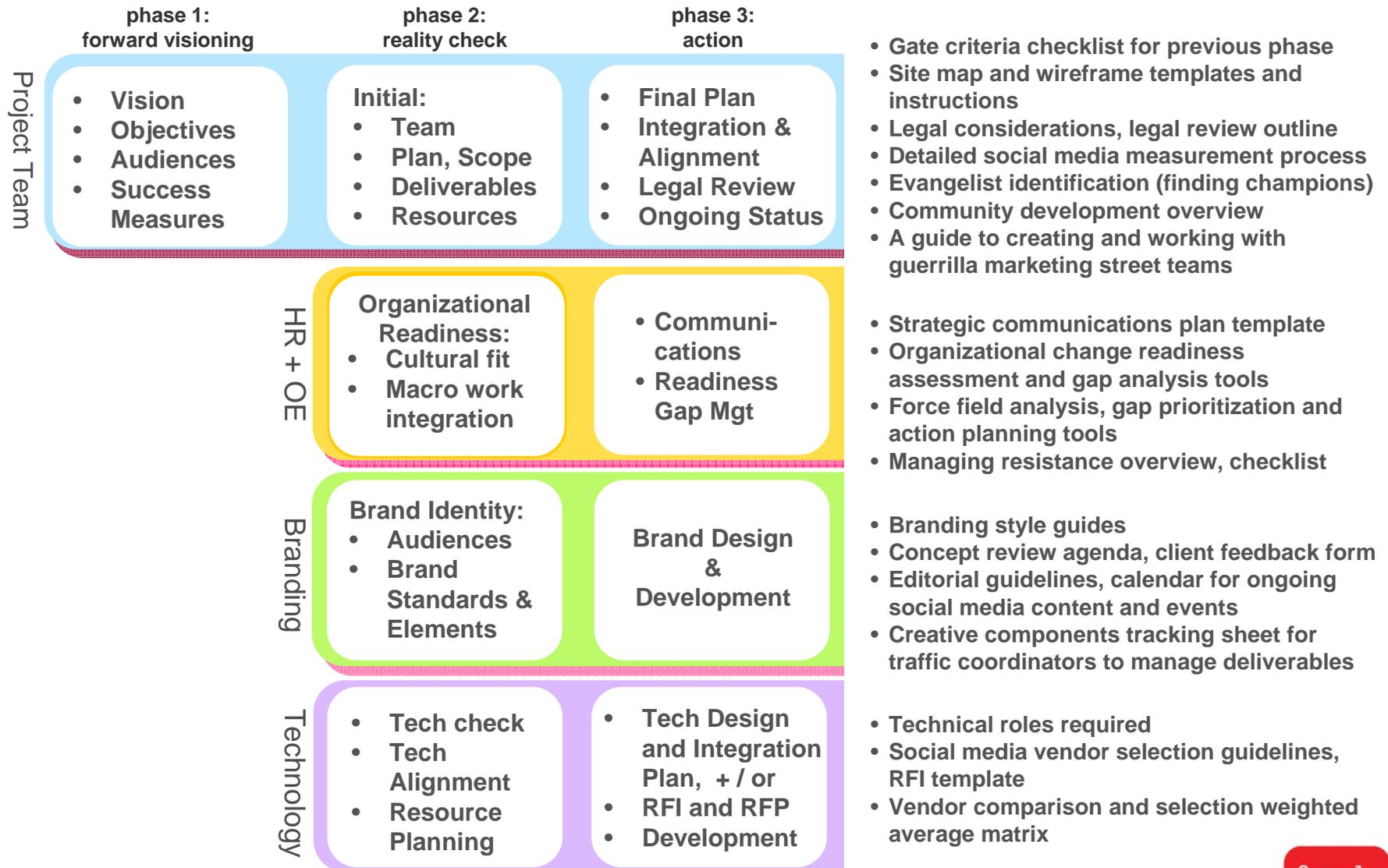
Phase 5:  
going

Community Dev  
kick to  
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ement

# phase 2 - reality check - topics



# phase 3 - action! - topics

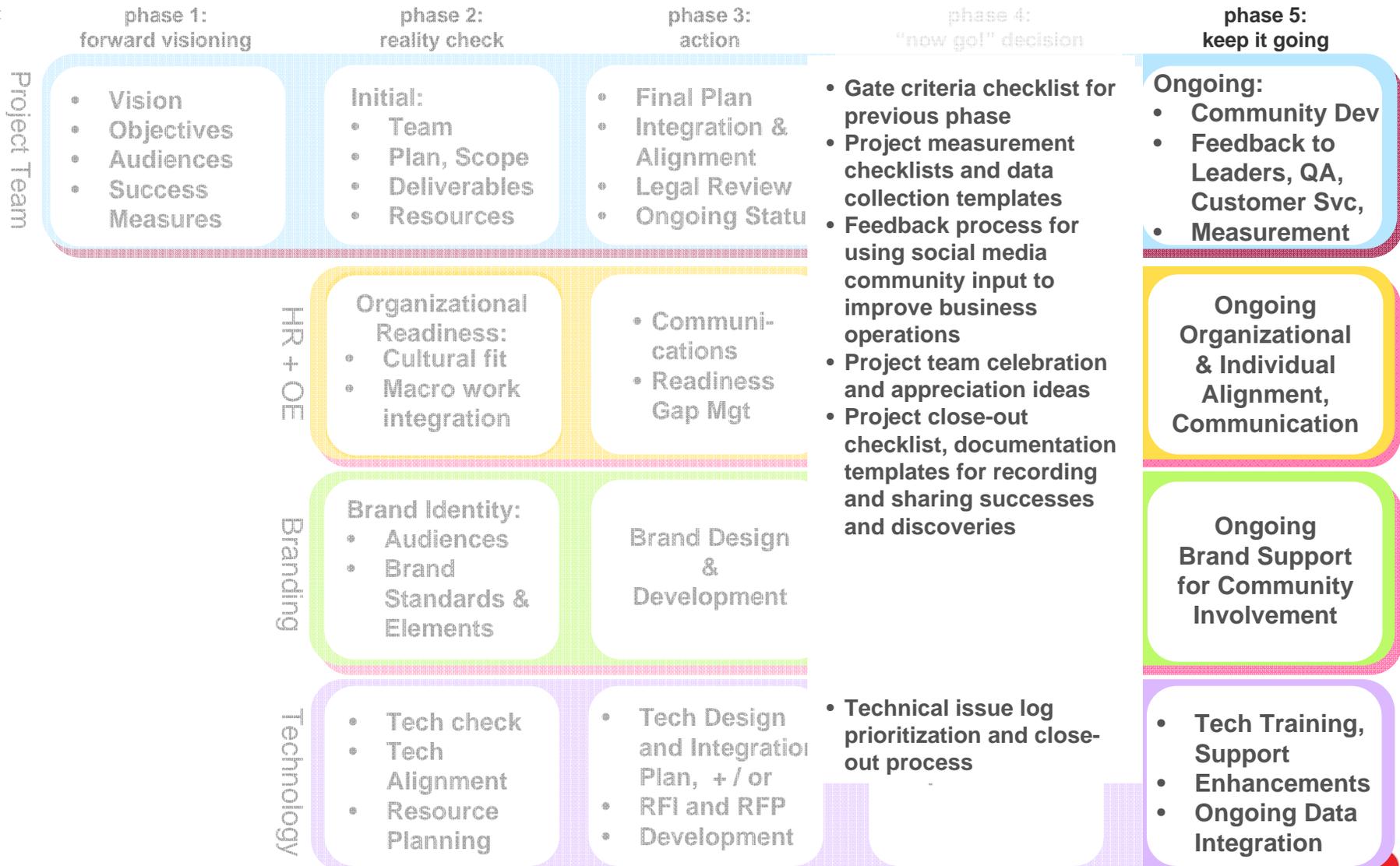


- Gate criteria checklist for previous phase
- Site map and wireframe templates and instructions
- Legal considerations, legal review outline
- Detailed social media measurement process
- Evangelist identification (finding champions)
- Community development overview
- A guide to creating and working with guerrilla marketing street teams
- Strategic communications plan template
- Organizational change readiness assessment and gap analysis tools
- Force field analysis, gap prioritization and action planning tools
- Managing resistance overview, checklist
- Branding style guides
- Concept review agenda, client feedback form
- Editorial guidelines, calendar for ongoing social media content and events
- Creative components tracking sheet for traffic coordinators to manage deliverables
- Technical roles required
- Social media vendor selection guidelines, RFI template
- Vendor comparison and selection weighted average matrix

# phase 4 - now go! - topics



# phase 5 - keep it going - topics



# requests today

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please ping me with your thoughts...

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Thanks STEP!

frank.

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