

# MANAGING Social Media DURING YOUR CONVERSION



*If your credit union utilizes any social media platforms, then this document is for you!*

Planning, organizing, executing, and monitoring social media activities and campaigns during the conversion process is an important part of the overall project management. Conversion social media project management can encompass a wide range of tasks like content creation, scheduling, and user engagement. Depending upon the tools at your disposal, for some it could even include analytics and reporting.

Whether you use Facebook, Instagram, Twitter, Tik Tok, or them ALL, consistent posting is the key to maintaining an engaged following during this critical time. Developing a well-planned content calendar can be vital in order to maintain a consistent posting schedule and audience engagement. We recommend organizing and visualizing your content plan including the types of posts (graphics/images,

text, videos or links), posting frequency and ideal publication times. The content calendar/timeline will assist you in scheduling posts, stories, videos etc. which will enable your credit union to achieve optimal visibility and engagement from your published content.

By now you're probably asking, WHEN should we communicate and WHAT should we be communicating? The sample timeline below outlines key timeframes and suggestions for content which has been successfully implemented by many of your peers. It may seem like more questions than answers, but these are all valid questions your members will have and will need answers to. Rest assured your Conversion Coordinator will guide you in obtaining this information.

We hope you find valuable insights and tips to effectively manage your social media efforts and ensure you reap the full benefits of these powerful marketing tools during this crucial time for your credit union and your members. We are here to help – Ask us about samples and other partner success stories, we are happy to share!

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# Conversion Timeline

## 45-60 Days *Prior to Live Date*

We recommend starting to update social media banners/graphics. Don't communicate too much too soon though! Keep it simple to start with a "Coming Soon" teaser or just communicating the upgrade date.

## 30 Days *Prior to Live Date*

Now is the time to start communicating important information regarding the upgrade, especially the timeline. What online services will be impacted and when? What is changing? What is staying the same? Do you have an Upgrade Guide to publish? It is also a great time to start touting any new benefits or enhancements resulting from the upgrade.

## 15 Days *Prior to Live Date*

This is a great time to reiterate the steps your members can take to prepare. Will their debit or credit card access be impacted, and should they prepare to have extra cash on hand? Are their eStatements converting or should they print/archive them ahead of time?

## 3-5 Days *Prior to Live Date*

The week leading up to your Live Date is the perfect time to post reminders. Ideal content for this period includes things like "Coming this week". "Reminder of branch closures and limited services".

## Live Day

The day has finally arrived! Content should shift to "welcoming" the upgrade and highlighting any new and improved services or features it brings. Continue to provide updates as services come online like Online Banking, Bill Pay, Mobile App and Mobile Deposit Capture. Now is also a great time to repost self service "how to" videos.

## Post Conversion

Following a major system upgrade, Social Media platforms are inevitably often used as a member service channel, with your members reaching out for support and information. Engagement with your social media users may be at an all-time high in the weeks following your upgrade. It is very important that someone is managing these inquiries, assigning them to the appropriate team members and ensuring timely responses.

Do you need help creating content or are you looking for someone to do it for you? The Xtend Communications Team can help. You can reach them at (866)981-4983 x313