



Social media strategy template

Company name

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1. Establish a clear purpose

Establish a clear purpose of your social media campaign — why are you running the campaign? Revisit your purpose often to ensure each aspect of your strategy aligns with it.

2. Understand your target audience

Your target audience's demographics, beliefs, hobbies, and goals should stay top of mind throughout your campaign. These prompts can help you get a sense of who your content is for.

Age range: _____

Geographic region (city, state, and/or country): _____

Three personality traits: _____

Wants, needs, and pain points:

Hobbies and interests:

Other industries or brands they buy from:

Misc. notes:

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3. Research your competitors

Researching the competition can teach you about what works and what doesn't, or give you inspiration when you run into creative blocks. Try to get into the competitor's mind and ask yourself why they made certain social media decisions. Choose three competitor brands to analyze with these prompts.

1 Brand name:

Social platforms they use and how often they post — posts per (day/week):

- | | |
|---|--|
| <input type="checkbox"/> Facebook: _____ | <input type="checkbox"/> TikTok: _____ |
| <input type="checkbox"/> Instagram: _____ | <input type="checkbox"/> YouTube: _____ |
| <input type="checkbox"/> Twitter: _____ | <input type="checkbox"/> LinkedIn: _____ |

Who is their target audience?

What format of content works best for them?
(Ex: text, audio, video, photography, illustrations, etc.)

What type of content works best for them?
(Ex: promotional, educational, informational, etc.)

What are they doing right?

What are they doing wrong?

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4. Choose the right social media channels

Outline which platforms you plan on using along with any notes that will come in handy when creating your content (content formats, post frequency, etc.).

Facebook:

Twitter:

Instagram:

TikTok:

YouTube:

LinkedIn:

Other:

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5. Determine your KPIs

Key Performance Indicators (KPIs) are quantifiable metrics you'll use to gauge your strategy's success.

Examples:

- ✓ Number of website visits that came from social profiles
- ✓ Number of shares per post
- ✓ Number of followers or subscribers gained
- ✓ Number of comments received per post
- ✓ Number of newsletter sign-ups

Platform #1:

1. _____
 2. _____
 3. _____
- Additional KPIs: _____

Platform #2:

1. _____
 2. _____
 3. _____
- Additional KPIs: _____

Platform #3:

1. _____
 2. _____
 3. _____
- Additional KPIs: _____

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5. Determine your KPIs

Platform #4:

1. _____
2. _____
3. _____

Additional KPIs: _____

Platform #5:

1. _____
2. _____
3. _____

Additional KPIs: _____

Platform #6:

1. _____
2. _____
3. _____

Additional KPIs: _____

Platform #7:

1. _____
2. _____
3. _____

Additional KPIs: _____

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6. Conduct a social media audit

After each campaign (as well as before and during, if you wish), conduct an audit of your social media accounts to track your KPIs and tweak your strategy as necessary.

1 How often will you conduct a social media audit? (Ex: 1x/month, after each campaign, etc.)

2 Which platforms are performing well for your strategy?

3 Which platforms aren't performing well?

4 What type of content is working?

5 What type of content isn't working?

6 What types of comments are you receiving (positive, negative, or both)? Any particular patterns?

7 Which KPIs are you meeting, and where is there room for improvement next time?
