

Social media marketing strategy made simple

The worksheet



If your efforts and your goals aren't aligned, you'll end up wasting time and resources on the wrong audience, or overlooking low-hanging fruit that is likely to produce results.

This social media marketing strategy template will assist you in defining your marketing objectives and prioritizing your efforts.

Step one: Your executive summary

Think of the executive summary as a "tweet summary." Use simple language, in just a few sentences to convey your message. The purpose of this section is to help you identify the problem that you're trying to solve by implementing a social media strategy.

Here are a few pointers on what you should be including.

1. What problem are you addressing?
2. Who are you talking to?
3. What is your ideal result?
4. What is your budget?
5. What are your time and resource restrictions?
6. Do you plan on going organic? Paid? A mix of both?

Step two: Identify your goals

When you put a stake in the ground, it makes it easier to stay on track. It helps to have a purpose. When you have a purpose and you're committed, it's easy to adjust your social media strategy as you go, without having to start over. A good strategy is always aligned with your overarching purpose.

Make sure that your goals are S.M.A.R.T!

Here are a few examples. Make sure that yours are aligned with your business.

| Your business goals | Your social media goals | How you measure success |
|--|-------------------------|--|
| Help potential students find the right degree | Awareness | New follows, increased engagement |
| Convince students to choose our institution | Engagement | Comments, likes, mentions, shares |
| Increase enrollment by 5% in the first quarter | Conversion | Leads generated, website clicks, email subscribers |

| By [Date], we will: | |
|---------------------|-------------|
| 1 | [Your goal] |
| 2 | |
| 3 | |
| 4 | |

Step three: Identify your audience

Make no mistake, planning and executing a social media strategy is serious business. But it doesn't mean you can't have fun doing it. Find your target audience. Get to know them, and get to know them well. Make your work relevant and fun to what they do, what they like, and where they live. While important to the success of your business, marketing can get complicated pretty fast. The hardest part is knowing who to talk to. That's where buyer personas come in: they help you stay focused on talking to the right kind of people.



| | Example persona | Persona 2 | Persona 3 |
|---------------------------------|---|------------------|------------------|
| Group | The Entrepreneur | | |
| Name | Ambitious-Alexander | | |
| Age | 35-43 | | |
| Generation | Millennial | | |
| Location | Sweeden | | |
| Financial background | Comes from an upper-middle-class family with a semblance of generational wealth | | |
| Professional background | Started his career in sales, worked his way up to middle management before starting his own business coaching company | | |
| Professional aspirations | Financial independence and notoriety | | |
| Personal goals | To achieve his full potential | | |
| Personality traits | An explorer, risk taker, and investor by heart | | |
| Challenges | A lack of support and access to reliable information in the time that he has available to make a decision | | |
| Fears | He worries that he won't be able to create a self-sustainable business and that his attempts will result in failure, leading him to re-enter the workforce as an employee and failed entrepreneur | | |
| Motivation | Financial independence - controlling his own source of income. Not relying on a payroll | | |
| Current emotional state | Anxious and overwhelmed - on the verge of burnout | | |
| Desired emotional state | Peaceful, content, motivated | | |

| | | | |
|--|---|--|--|
| Decision-making status | He is ready to make a decision. Primary decision maker for himself and his business | | |
| What could impact the decision? | Time constraints | | |
| Level of education | MBA | | |
| Social media usage | Primary: LinkedIn Secondary: Instagram | | |
| Why do they use social? | Staying up to date with industry news and developments, supporting his own business, and connects with his friends and family | | |
| Where do they obtain information? | Business news sites, blogs, podcasts | | |
| How do they want to be spoken to? | Professional, informative, decisive - occasionally appreciates inspirational stories of his peers | | |
| What do they want to hear? | Your future is in your hands - staying relevant is simple | | |
| What are their objections? | Lack of time & trust | | |
| Can they be changed? | Building brand authenticity | | |
| What do they hope to achieve by choosing you? | Personal and professional validation | | |
| Ideal message delivery system | Social (+ LinkedIn), webinars, podcasts, blog posts | | |
| Decision-making process | Recommendations from trusted advisors, business influencers - and thorough research + testimonials | | |
| Status before | Unhinged & overwhelmed | | |
| Status after | Empowered, motivated, proud that he can prove knowledge | | |

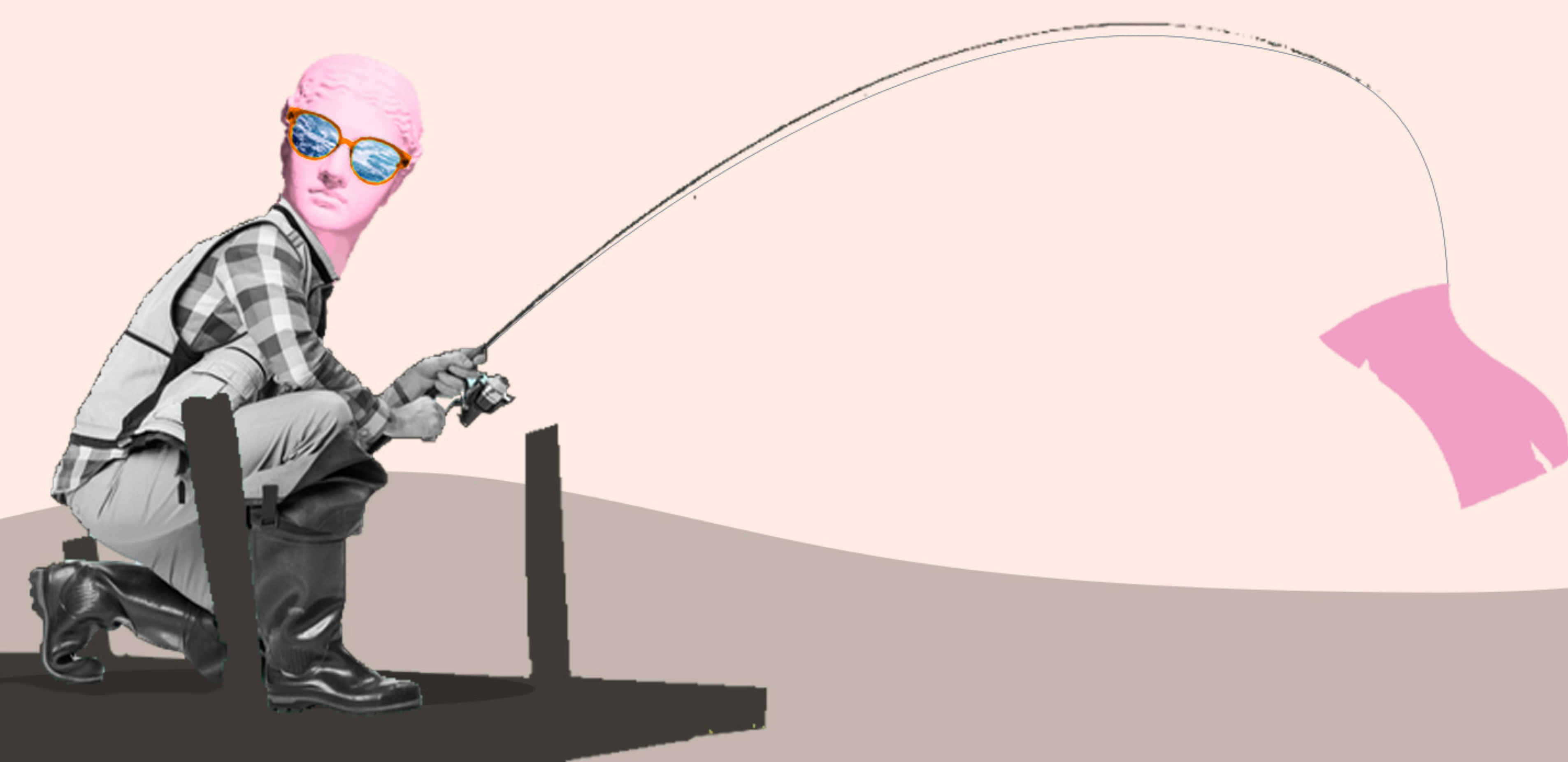
Step four: Analyze your competitors

Track your competitors' progress and learn which strategies are working—and which aren't. This will help you shape an effective social media strategy that meets your needs.

| | # of active accounts | Platforms used | Observable strategy | # of Followers | Strengths | Weaknesses |
|---|----------------------|----------------|---------------------|----------------|-----------|------------|
| 1 | | | | | | |
| 2 | | | | | | |
| 3 | | | | | | |

After looking outwards, it's time for some introspection. Here, you will conduct a **SWOT** analysis of your own business.

| Strengths | Weaknesses |
|---------------|------------|
| | |
| Opportunities | Threats |
| | |



Step Five: Have a look at what you're already doing

Data and analytics is something that we live, breathe, and eat (we don't actually). A social media audit highlights your efforts. Analytics is like that good friend who's always giving you useful advice. He knows what to say and when to say it and he makes everything sound conservative.

Here are a few questions to ask yourself:

1. What content are you currently posting, if any?
2. Which platforms are you currently active on?
3. How much engagement does your content receive?
4. How are your followers performing? Are you losing, gaining, or remaining consistent?
5. What are your followers saying?

| Platform | # of followers | Posting frequency | Engagement rate | Reach | Click-through -rate |
|-----------|----------------|-------------------|-----------------|-------|---------------------|
| Facebook | | | | | |
| Instagram | | | | | |
| LinkedIn | | | | | |
| Twitter | | | | | |
| Pinterest | | | | | |
| TikTok | | | | | |
| YouTube | | | | | |

How to determine your next steps.

| | What works | What doesn't work |
|------------|------------|-------------------|
| Platform 1 | | |
| Platform 2 | | |
| Platform 3 | | |
| Platform 4 | | |
| Platform 5 | | |

List your action items.

| What you need to do | When you need to do it by |
|---|---------------------------|
| Increase posting frequency on Instagram | End of January |
| | |
| | |

Step Six: Determine your KPIs

What does social media "success" look like? Well, that's what we're here to figure out. Because defining success is the first step toward hitting your goals. KPIs are what you get when you take business stats and make them sing, dance, and do backflips. Use them to measure -- and improve -- your marketing efforts.

Here are some examples of KPIs to track in 2023.

1. Likes

I.e., the number of people who like your post.
 Example KPI: A minimum of 25 likes per post.

2. Engagement rate

I.e., A combination of likes, shares, follows, and anything where a person engaged with a post or your account.
 Example KPI: An increase of 7% in the first quarter.

3. Click-through rate

I.e., How often people click links in your posts.
 Example KPI: An average CTR of 25% in the first quarter.

Step seven: Outline your content strategy

It's simple: a good social media content strategy is part map and part guidebook, but most importantly, it tells you where to post, what to post, and how often to post to ensure a return on investment. It's your blueprint for success.

Determine your content pillars

The core of any great social media marketing campaign is its content pillar. Think of a content pillar as a highway of awesome content that helps you reach your audience base and evangelize your brand.

| | Pillar 1 | Pillar 2 | Pillar 3 | Pillar 4 | Pillar 5 | Pillar 6 |
|--------------|------------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Example | Educational | Promotional | Community | Entertainment | Engagement | Recreational |
| What it does | Educate & inform | | | | | |
| Frequency | 4 x p/m | | | | | |
| Ideas | Infographic | | | | | |

Determine your posting frequency

There is a common misconception that in order to remain relevant, an account should be posting multiple times a day - 7 days a week - 365 days a year. Now unless you're a social media influencer, or you're in a paid partnership with another brand - there is actually little value in this strategy. Here's what that does:

- Creates a sense of insecurity, your followers might find this to be a desperate attempt to remain relevant
- Increases the likelihood of frequent (and multiple) unfollows - your audience won't appreciate it if their entire feed is about education, and they may quickly become bored of the account
- Increased the possibility of repetitive and irrelevant content

Create your calendar

Tip: Create separate calendars for each platform.

| Date | Topic | Caption and hashtag | Creative instruction |
|------|-------|---------------------|----------------------|
| | | | |
| | | | |
| | | | |
| | | | |
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