

A Daily Social Media Checklist

- ☐ Finish any outstanding tasks from the day before.
- ☐ Check that posts publishing today ready to go.
 - Are correct accounts tagged?
 - Do links work?
 - Are posts spelling and grammar error free?
- ☐ Review meetings on your agenda for today.
 - Finish research prep work and notes.
- ☐ Check the status of upcoming graphics and videos.
- ☐ Review any images or videos that need to be approved for your social channels.
- ☐ Respond to inbound messages or mentions (if necessary).
- ☐ Edit upcoming content for each social media channel.
- ☐ Approve any content that is ready for publish.
- ☐ Engage with thought leaders.
- ☐ Reshare content from partners/influencers.
- ☐ Update social media calendar.
- ☐ Engage with potential customers.
- ☐ Read industry news.
- ☐ Curate content for social media channels.

Notes:



Quarterly Social Media Analysis Checklist

- ☐ Decide your time period for analysis.
- ☐ Create report template.
- ☐ Gather data.
- ☐ Analyze data.
 - Note trends.
 - Observe if the team is meeting their goals.
- ☐ Prepare report.
- ☐ Send to client/upper management.
- ☐ Decide if strategy adjustment is needed based on the analysis.

Notes:



Social Media Audit Checklist

- ☐ Review and secure all your social media profiles
- ☐ Analyze the performance of each of your social media profiles
- ☐ Review your publishing schedule
- ☐ Run an audience analysis
- ☐ Complete a content analysis
- ☐ Run a SWOT analysis
- ☐ Add or delete social channels from your profile
- ☐ Review goals from the previous year

Notes:



Social Media Campaign Checklist

- ☐ Brainstorm a theme with your team.
- ☐ Outline dates for the campaign.
- ☐ Determine which channels will be used.
- ☐ Determine audience
- ☐ Set ad budget (if necessary).
- ☐ Outline image and video needs.
- ☐ Assign deadlines to team members for projects.
- ☐ Choose hashtags.
- ☐ Write post copy.
- ☐ Shoot/design visual content.
- ☐ Edit content.
- ☐ Approve graphics or videos.
- ☐ Check links.
- ☐ Upload messages into publishing tool.
- ☐ Schedule campaign.
- ☐ Measure results.

Notes:



General Management Social Media Checklist

- ☐ Review the workload of your team.
- ☐ Monitor upcoming campaigns.
- ☐ Check incoming social messages:
 - ☐ - Spot potential crises.
 - ☐ - Help manage customer engagement
 - ☐ - Look for reviews or quotes you can repromote (especially if it's a nice review).
- ☐ Prepare for upcoming strategic meetings.
- ☐ Prepare reports for upper management or clients.
- ☐ Monitor competitor's channels.

Notes:



A Social Media Manager's Daily Schedule

- 5:30 am - Start the day.
- 6:45 am - Get ready for work.
- 8:00 am - 8:30 am - Arrive at work.
- 9:00 am to 12:00 pm - Social media check in, meetings with team and vendors.
- 12:00 pm - Lunch
- 1:00 pm - Gather analytical data.
- 2:00 pm - Respond to team emails and questions.
- 2:30 pm - Respond to customer mentions and questions.
- 3:30 pm - Curate content.
- 4:00 pm - Check that posts for the next day are ready to go.
- 4:30 pm - Review upcoming content.
- 5:00 pm - Prepare for upcoming meetings.
- 6:00 pm - Head home.

Notes:



Social Media Strategy Checklist

- ☐ Review last year's strategy.
- ☐ Research new trends and ideas.
- ☐ Review target audience.
- ☐ Review business objectives.
- ☐ Set goals.
- ☐ Establish metrics and KPIs.
- ☐ Determine tactics.
- ☐ Map out seasonal campaigns on social media calendar.
- ☐ Establish reporting schedule.

Notes:



Social Media Crisis Communication Checklist

- ☐ Pause all social media campaigns immediately.
- ☐ Check in with upper management to determine next steps.
- ☐ Determine what kind of messaging should be used.
- ☐ Respond individually to people on social.
- ☐ Issue apology from the company.
- ☐ Edit campaigns for content that may inflate crisis again.
- ☐ Once crisis has passed resume campaigns.

Notes:

