

Social Media Strategy Workbook

A working framework to align goals, content, channels, and measurement

Business Context & Objectives

Anchor the strategy to business priorities

Primary Business Objective(s)	(What business outcome does this strategy support?)
<input type="text"/>	
Timeframe This Strategy Supports	(Quarter, half, or full year)
<input type="text"/>	
Key Stakeholders	
<input type="text"/>	

Social Media Goals

Define what success looks like on social

Awareness Goals
<input type="text"/>
Engagement Goals
<input type="text"/>
Conversion or Support Goals
<input type="text"/>

Target Audiences & Insights

Ensure the strategy is audience-led

Primary Audience Segments	(Who this strategy is designed to reach)
<input type="text"/>	
Key Needs, Behaviors, or Pain Points	
<input type="text"/>	
Notable Insights from Social Listening or VoC	(Patterns, feedback, or recurring themes)
<input type="text"/>	

Content Pillars

Establish consistent themes

Pillar name (High-level theme)	Purpose (Why this pillar exists)	Example topics
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Channel & Platform Strategy

Align channels to audience and goals

Platform	Role of the Platform	Primary Audience on That Channel
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Content Cadence & Format Guidelines

Support consistency without over-prescription

Posting Frequency by Platform
<input type="text"/>
Primary Content Formats
<input type="text"/>
Notes on Localization or Market Variation
<input type="text"/>

Engagement & Community Guidelines

Define how the brand shows up in conversation

Tone and Voice Notes	(How the brand should sound in conversation)
<input type="text"/>	
Response Expectations	
<input type="text"/>	
Escalation Considerations	(When issues should be routed internally)
<input type="text"/>	

Measurement & KPIs

Align on how performance is evaluated

Primary KPIs	(Metrics that reflect meaningful success)
<input type="text"/>	
Supporting Metrics	
<input type="text"/>	
Measurement & Reporting Tools Used	(For example: social listening platforms, native analytics, or social media management tools)
<input type="text"/>	
Review Cadence (Monthly, Quarterly, etc.)	
<input type="text"/>	

Roles & Ownership

Clarify accountability

Strategy Owner
<input type="text"/>
Execution Owner(s)
<input type="text"/>
Review or Approval Owner
<input type="text"/>

Review & Iteration Notes

Reinforce this as a living document

Last Updated Date
<input type="text"/>
Summary of Changes Made
<input type="text"/>
Notes for Next Review
<input type="text"/>