Social Media Workbook

YOUR NAME HERE

Logo

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How to Use the Workbook

With this workbook, you'll have all you need to...

1. Consistently post high-quality social media content
2. Manage your social accounts with less stress and more results

This workbook is intentionally organized to start with building your content foundation, then guiding you to run your own, well-oiled social media machine.

Follow the prompts to customize this template for *your* business or organization. Add your logo, your metrics, and anything else that will serve you and your team.

Then, give yourself a hand for today's hard work that will make tomorrow's social posting easier. 👏

- **AUDIT YOUR ACCOUNTS**
- **TRACK YOUR METRICS**
- **ANALYZE COMPETITORS**
- **REVAMP YOUR INSTAGRAM BIO**
- **OPTIMIZE YOUR CONTENT**
- **BUILD A POSTING CALENDAR**

Audit Your Accounts

We won't know how far we've come if we don't know where we started. Log into your accounts or your social scheduling platform to find your starting data.

Starting Snapshot

	Number of followers	Posting frequency	Days/times you normally post	Average interactions (likes/shares/ comments)
PLATFORM 1				
PLATFORM 2				
PLATFORM 3				
PLATFORM 4				
PLATFORM 5				
PLATFORM 6				

Metrics to Track

	Impressions	Shares	Published posts	Sessions	Clicks
PLATFORM 1					
PLATFORM 2					
PLATFORM 3					
PLATFORM 4					
PLATFORM 5					
PLATFORM 6					

Glossary

- **Impressions:** number of views your posts receive
- **Shares:** number of times users re-post your posts
- **Published posts:** number of live posts on your accounts
- **Sessions:** number of web sessions on your site that came from social media
- **Clicks:** number of times users click a link on your posts

Content Optimization

Your social media content needs to do several things to be successful:

- Stay on a consistent schedule
- Educate followers on what you offer
- Compel people to click your links to your website
- Delight your target audience
- Make people want to share your posts and content with others

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Target Audience

1. What's their demographic? Age? Location? Job?

2. What social media platform(s) are they on?

Target Audience

3. What's a big problem or pain point in their life?

4. What type of content are they interested in seeing? Research keywords in your niche and see what's going viral and getting attention.

5. What would motivate them to buy from you/give to you?

Content Goals

Based on what your target audience is looking for, what type of content will you aim to create each day? A blog snippet? Infographic? Funny reel? Photo dump? The world's your oyster.

	Topic idea	Content examples to reference
Sunday		
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday		

Competitive Analysis

Browse some profiles of accounts that are competing for a similar audience as you. Then take notes to help inform your strategy:

- What is this competitor doing well?
- How can you improve on what they're doing?
- What types of posts get the most engagement?
- What trends could you join in on with your content?

COMPETITOR NAME	WHAT I LIKE	HOW I CAN DO IT BETTER

Instagram Bio Revamp

Your Instagram bio is an easy place to capture your audience when they first land on your profile. Here's a breakdown of how to write it:

Instagram Bio Formula

Line #	Line Strategy	Example Content
Name	Name | Industry (Searchable, for SEO)	Lewis Lawn Care | Denver Landscaping
1	Concise statement of how you serve your audience	Excellent, affordable, residential lawn care
2	Additional clarifying identity statement	A beautiful lawn makes a beautiful home
3	Credibility; stats; gain trust of audience that you're an expert	5,000+ happy customers in Denver
4	CTA	Book a Service
5	Link in bio	*Link to a simple mobile page with service options.*

Link In Bio

Hopefully by now your audience is interested and ready to engage with you on a deeper level. This is where the link in bio comes in. Link to CTAs that you mention in your posts and that bring visitors to pages where they'll convert.

Here are some CTA ideas for our example lawn care business.

- Book a Service
- Get 20% off your first lawn service *(link to newsletter sign up & coupon code)*
- Summertime Lawn Do's & Don'ts *(landing page for an eBook download)*

Instagram Bio Revamp

Now it's your turn 👇

[Business Name] Instagram Bio

Line #	Line Strategy	Example Content
Name	Name | Industry (Searchable, for SEO)	
1	Concise statement of how you serve your audience	
2	Additional clarifying identity statement	
3	Credibility; stats; gain trust of audience that you're an expert	
4	CTA	
5	Link in bio	

Link In Bio

- CTA 1
- CTA 2
- CTA 3
- CTA 4

The Calendar

This is the workhorse in your social media strategy. It's where you can dump all your ideas and organize them into an efficient schedule. **Let's start with when to post:**

Days & Times to Post

Recommended Amount of Posts	Best Day of the Week to Post	Best Time of Day to Post (MST)
Facebook - 2x a day	Facebook - Wednesday	Facebook - 10am - 12pm
Instagram - 1x a day	Instagram - Tuesday	Instagram - 10am - 1pm
LinkedIn - 1x a weekday	LinkedIn - Tuesday through Thursday	LinkedIn - 9am - 12pm (T), 9am-2pm (Th)
X - 5x a day	X - Wednesday and Friday	X - 8am for engagement, 10am for activity

60-ish posts per week is a lot to start, but don't worry! If you focus on **quarterly posting goals**, you can slowly ramp up as content creation gets easier.

Quarterly Posting Goals

	FACEBOOK	INSTAGRAM	X	LINKEDIN
Q1	3x a week	3-4x a week	1-2x a day	1-2x a week
Q2	7-10x a week	4-5x a week	3x a day	3x a week
Q3	11-13x a week	5-6x a week	4x a day	4x a week
Q4	2x a day	1x a day	5x a day	1x a day

Build Your Calendar

Duplicate this page whenever you need to plan more content.

Move the lines & text around to add another column if you need!

Q1 POSTING GOALS	**Facebook** (3x/week)	**Instagram** (3-4x/week)	**X** (1-2x/day)	**LinkedIn** (1-2x/week)
SUNDAY	Time Content CTA link	Time Content CTA link	Time Content CTA link	Time Content CTA link
MONDAY				
TUESDAY				
WEDNESDAY				
THURSDAY				
FRIDAY				
SATURDAY				

Monthly Check Ins

Things change quickly on social media so it's important to watch the trends. Do some quick research on keywords in your niche, what's going viral, and what content "hooks" and CTAs others are using.

Then, use the table below to record what happened in your accounts the last 30 days. Duplicate this page for each new month.

Month 1 Checkin

	Impressions	Shares	Published posts	Sessions	Clicks	Followers
PLATFORM 1						
PLATFORM 2						
PLATFORM 3						
PLATFORM 4						
PLATFORM 5						

Account Info

Logins

Platform 1 - *link*

Username:
Password:

Platform 2 - *link*

Username:
Password:

Platform 3 - *link*

Username:
Password:

Platform 4 - *link*

Username:
Password:

Platform 5 - *link*

Username:
Password: