

Social Media Strategy Template

Complete this template to transform your social media from random posting into a measurable business asset.

BRAND NAME

INDUSTRY

DATE

NEXT REVIEW

OWNER

The SCOPE Framework

This template guides you through a comprehensive social media strategy. Each section builds on the previous to create a cohesive, measurable approach.

S — Strategy

Business Objectives

Define your primary business objective, target audience, and KPIs that will guide all social media efforts.

C — Channels

Platform Selection

Choose primary and secondary platforms based on where your audience is most active. Document rationale for each.

O — Operations

Workflows & Systems

Posting schedules, team roles, AI tools, budget allocation, and approval processes for consistent execution.

P — Production

Content Engine

Content pillars, formats, and brand voice. A repeatable content creation system that scales with your needs.

E — Evaluation

Measurement & ROI

Reporting cadence, analytics tools, and revenue attribution. Connect social media efforts to business outcomes.



How To Use This Template

Follow these steps for best results

Complete Sections In Order

The SCOPE framework builds upon itself – your Strategy informs your Channels, which shapes your Operations, guides your Production, and determines how you Evaluate success. Each section connects to the next.

1

Fill In Details

Complete each field thoughtfully. Use the decision prompts as guides to help you make the right strategic choices at each step.

2

Review & Refine

Share with stakeholders, gather feedback, and iterate on your strategy. Use the Version Log to track every change and who approved it.

3

Execute & Measure

Implement your plan, track KPIs using the Evaluation section, and adjust based on performance data. Review quarterly – never annually.

Important Note

Review this strategy document quarterly – not annually. Social media moves fast. A strategy that is never reviewed is a strategy that drifts. Build the review cadence into your calendar before you publish your first post.



Primary Business Objective

What specific, measurable business outcome will social media drive?

Secondary Business Objective

Supporting goal for this period.

The Role of Social Media

In one sentence, describe the primary job of social media in achieving the goals above.

Key Success Metrics (KPIs)

3–5 measurable indicators tied directly to your objective.

Decision Prompt

If social media could achieve only one thing for your business this year, what would it be? This answer should become your primary focus — everything else is secondary.



Target Audience Profiling

Define who you're talking to before you say anything



Primary Audience Persona

Persona Name

Role / Title

Demographics

Where They Spend Time Online

Primary Pain Point We Solve

Secondary Audience Persona

Persona Name

Role / Title

Demographics

Where They Spend Time Online

Primary Pain Point We Solve

Decision Prompt

Describe your ideal customer as if explaining them to a new salesperson. What problem do they have that you solve better than anyone else?



Priority Platforms

Highlight or mark the platforms your strategy will focus on.

Instagram Facebook LinkedIn TikTok X / Twitter YouTube Pinterest Threads

Primary Platform — Rationale

Which single platform will you go deepest on first, and why?

Secondary Platform(s) — Rationale

Supporting channels for extended reach or content repurposing.

Platforms Deprioritised & Why

Name the platforms you're consciously not using this period.

Why These Platforms?

Strategic rationale — audience presence, content fit, competitor activity, business goals alignment.

Decision Logic

For B2B, LinkedIn is often the most logical starting point. If your product is visual and targets consumers, Instagram or TikTok will deliver better results. Pick one and go deep before spreading thin.



Publishing Cadence Per Platform

How often will you post on each platform?

Instagram	LinkedIn	TikTok	Other

Team Roles & Responsibilities

Who creates, reviews, publishes, and responds?

Approval & Review Process

Workflow from draft to publish – who approves, turnaround times.

Competitive Positioning Map

Find where you can be different and better – not where you can copy what already exists.

Competitor 1

Name

Primary Platform

Strength

Weakness

Our Opportunity

Competitor 2

Name

Primary Platform

Strength

Weakness

Our Opportunity

Decision Prompt

What is one thing your audience needs that your competitors are not providing on social? That gap is often where your most valuable content opportunities lie.



Operations (Continued)

AI Stack & Budget Allocation



AI Tools & Automation Stack

Document tools at each workflow stage. Be specific – "AI tools" is not a plan.

Content Ideation

Copywriting & Drafting

Visual Creation

Scheduling & Analytics

Budget Allocation

Treat your social media budget as a dedicated line item – not discretionary spend.

TOTAL MONTHLY BUDGET

PAID ADS %

CONTENT %

TOOLS %

INFLUENCER %

Budget Notes / Seasonal Adjustments

Note any budget flexibility, seasonal shifts, or campaign-specific increases planned for the year.



Strategy Review Schedule & Version Log

Keep your strategy alive and accountable



Review Cadence

A strategy that is never reviewed is a strategy that drifts. Set your cadence before your first post goes live.

Weekly (15 min)

Tactical check-in topics

Monthly (1 hour)

KPIs and trend analysis

Quarterly (2-3 hours)

Strategic review and ROI assessment

Version Log

Document every significant change to this strategy – who made it, when, and why.

Version	Date	Key Changes Made	Approved By

Decision Prompt

When reviewing performance, ask whether you need to adjust the "how" (tactics) or reconsider the "why" (strategy). Tweaking ad copy is tactical. Questioning whether you're on the right platform is strategic.



Content Pillars (3–5 Core Themes)

Pillars should map to problems your audience is trying to solve — not the products you sell.

Pillar 1

Pillar 2

Pillar 3

Pillar 4

Pillar 5 (Optional)

Content Mix Ratio

e.g. 60% Educational / 20% Promotional / 20% Community

Content Formats

Highlight or mark all content formats you will produce.

IMG

Static Images

VID

Video Content

CAR

Carousels

STY

Stories

LIV

Live / Reels

Posting Frequency Per Pillar

e.g. "Educational: 3x/week on LinkedIn", "Behind-the-Scenes: 2x/week on Instagram Stories"

Brand Voice & Tone

3–5 adjectives. Formal ↔ Conversational | Authoritative ↔ Approachable | Broad ↔ Niche

Pro Tip: The 80/20 Rule

80% of your content should educate, entertain, or inspire. Only 20% should directly promote. This builds trust and engagement before asking for the sale.



Campaign Objectives

Highlight or mark all campaign objectives this strategy will support.

AW

Awareness

EN

Engagement

TR

Traffic

LD

Lead Gen

CV

Conversions

Key Performance Indicators

Document the specific metrics you will track under each category.

Reach Metrics

Engagement Metrics

Conversion Metrics

Goal-To-Metric Mapping

For each business goal, document the primary KPI, secondary KPI, and what not to track in isolation.

Goal Type	Primary KPI	Secondary KPI	Do Not Track Alone

Reporting Cadence & Format

Weekly, monthly, quarterly reports — who receives them and in what format?

Analytics Tools & Platforms

Revenue Attribution Method

Optimization Triggers & Benchmarks

What does success look like? When do you pivot?

Decision Prompt

When reviewing performance, ask whether you need to adjust the "how" (tactics) or reconsider the "why" (strategy). Tweaking ad copy is tactical. Questioning whether you're on the right platform is strategic.



Wrap-Up & Next Steps

Milestones, notes, and tips to launch with confidence

ALL SECTIONS

Key Dates & Milestones

Strategy Launch	First Review	Quarterly Schedule

Additional Notes & Immediate Next Steps

Strategy Tips from SCOPE

Social Feeds Are Search

Optimise every caption for TikTok, LinkedIn, and Google AI Overviews – not just your existing followers. Include the exact phrases your audience searches before they need a solution like yours.

Consistency Beats Frequency

Three high-quality posts per week published consistently will always outperform seven inconsistent ones. Set a cadence your team can sustain, not one that looks impressive on paper.

Document. Review. Adjust.

Review quarterly, update KPIs monthly, and log every change in the Version Log. A strategy that exists only in someone's head is not a strategy – it's a wish. Make it real by writing it down.

One Platform First

Resist the pressure to be everywhere at once. Pick the single platform where your audience is most active and go deep before expanding. Depth on one channel builds more authority than shallow presence on five.

Connect Every Metric to Revenue

If you cannot explain to a non-marketer why a metric matters to the business, it is probably a vanity metric. Tie every KPI back to leads, conversions, or revenue – or replace it with one that does.

Strategy Complete — Now Execute, Measure, and Optimise