Social Media Budget Allocation Template (Starter & Enterprise)

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Cover Information

Fill in the fields below before distributing this document internally or sharing with an agency partner.

Field	Your Entry
Business Name	
Budget Period (e.g., Q1 2026 / Full Year 2026)	
Total Budget	$
Scenario Type	☐ Starter ☐ Growth ☐ Enterprise
Prepared By	
Last Updated	

Section 1: Budget Line-Item Table

Enter your total budget in the header row. The percentage columns are pre-filled with Sociallyin's recommended starting shapes. Adjust the dollar fields to match your actual allocation decisions.

> **How to use this table:** Starter percentages assume a ~$10,000 beginning budget, so the Starter dollar column is illustrated at that total. Growth and Enterprise percentages are starting shapes only, and their dollar columns stay blank for you to fill against your own total. Whichever scenario you use, reallocate monthly using the CAC, LTV, and attribution data you log in Section 5.

Line Item	Starter %	Starter $	Growth %	Growth $	Enterprise %	Enterprise $	N
Content Production & Creative	50%	$	35%	$	30%	$	S c p r f F I a
Paid Social; Meta (Facebook / Instagram / Threads)	25%	$	35%	$	40%	$	M c c i a r f A C r
Tools & Software	10%	$	10%	$	10%	$	S p a s a s
Analytics & Attribution		Included in Tools	5%	$	10%	$	D C c b r a c p
Experimentation Reserve (70/20/10 test bucket)	10%	$	10%	$	5%	$	A t p p

Line Item	Starter %	Starter $	Growth %	Growth $	Enterprise %	Enterprise $	N
							e f
Agency / Team / Reporting Overhead	5%	$	5%	$	5%	$	F s r f r c
TOTAL	**100%**	**$**	**100%**	**$**	**100%**	**$**	

> **Note on the starter split:** Content Production is set to 50% so the starter column sums cleanly to 100%. That extra 5% versus a leaner content line is a deliberate choice, since content is the lever the content-first sequence leans on hardest. If you would rather fund a different line item with that 5%, adjust it here before you distribute the template, and keep the column at 100% total.

Section 2: Funding Sequence Checklist

Work through these steps in order. Do not advance a step until the prior one is funded and active. This sequence applies at the starter, growth, and enterprise level, and what changes at scale is how each step is resourced, not the order.

Step	Action	☐ Done	Dollar Amount Committed
Step 1	Fund content production. Enough shoot days, copy, and platform-native assets to test at least three distinct creative angles across Facebook, Instagram, and Threads.	☐	$
Step 2	Activate tools and analytics. Scheduling platform live, attribution software connected, baseline metrics recorded before any paid spend begins.	☐	$
		☐	$

Step	Action	☐ Done	Dollar Amount Committed
Step 3	Post organic content. Run at least five posts per channel across two or more creative angles. Record CTR, engagement rate, and any early conversion signals per post.		
Step 4	Release paid social reserve, only after at least two organic posts clear the signal thresholds in Section 3. Apply paid amplification on Meta to the specific assets that passed the threshold.	☐	$
Step 5	Activate the experimentation reserve. Launch one A/B creative test or one new-platform pilot using the 10% bucket. Document results using the reallocation log in Section 5.	☐	$

Section 3: Content-First Signal Thresholds

These are your reallocation triggers. Do not shift budget from content into paid social until every threshold in the checklist below is met. Fill in your own targets before the campaign starts, and do not fill them in after the fact.

Fill In Your Targets Before Launch

Metric	Your Target	Actual (Fill In After Testing)	Threshold Met?
CTR Target (organic post click-through rate baseline for your category)	%	%	☐ Yes ☐ No
Cost-Per-Result Target (maximum acceptable cost per desired action from boosted/paid posts)	$	$	☐ Yes ☐ No
CAC Baseline (current customer acquisition cost across all channels, pre-campaign)	$	$	☐ Yes ☐ No
	$	$	☐ Yes ☐ No

Metric	Your Target	Actual (Fill In After Testing)	Threshold Met?
LTV Baseline (average customer lifetime value used to judge CAC efficiency)			
Conversion Rate Threshold (minimum organic or boosted conversion rate before scaling paid spend)	%	%	☐ Yes ☐ No

Reallocation Trigger Checklist

All three conditions below must be true before moving budget from the content reserve into paid social.

- ☐ At least two organic posts have achieved a CTR at or above your CTR target above.
- ☐ At least one boosted post has returned a cost-per-result at or below your cost-per-result target above.
- ☐ Attribution data shows at least one confirmed conversion path running through the social channel.

> **If not all three are checked:** Hold the paid reserve. Reinvest in content production for additional creative angles. Recheck after the next organic testing cycle.

Section 4: 70/20/10 Budget Mapping

Use this table to distribute your total budget across risk tiers. The 70/20/10 rule is a starting shape, not a fixed law. Let your CAC and conversion rate data move the lines over time.

Tier	Description	% of Total Budget	Dollar Amount	What Goes Here
Proven Tactics (70%)	Channels and formats with confirmed CAC-to-LTV ratios and	70%	$	Meta campaigns behind organic-tested creative; proven post

Tier	Description	% of Total Budget	Dollar Amount	What Goes Here
	positive conversion rate history			formats; top-performing audience segments
Growth Opportunities (20%)	Emerging winners with early positive signal but not yet fully validated	20%	$	Scaling a new Meta format; testing Threads as an organic channel; expanding to a secondary audience segment
Experiments (10%)	Unproven formats, platforms, or creative angles with no established performance baseline	10%	$	New platform pilots; creative concept tests; messaging angle experiments; emerging format trials
TOTAL		**100%**	**$**	

Notes on this period's allocation decisions:

Section 5: Performance Reallocation Log

Complete this table at the end of each calendar month. Use it to make budget reallocation decisions based on data, not assumptions. Archive previous months rather than overwriting them.

> **Column definitions:** CAC = total channel spend ÷ new customers acquired from that channel. Attribution Source = which tool or method confirmed the conversion path (e.g., Meta Pixel, Conversions API, UTM + CRM match). Reallocation Decision = increase / decrease / hold / pause.

Month: ___

Channel / Placement	Spend This Month	CAC	LTV	Conversion Rate	Attribution Source	Reallocation Decision	Note
Meta; Facebook Feed	$	$	$	%		☐ Increase ☐ Decrease ☐ Hold ☐ Pause	
Meta; Instagram Feed	$	$	$	%		☐ Increase ☐ Decrease ☐ Hold ☐ Pause	
Meta; Instagram Stories/Reels	$	$	$	%		☐ Increase ☐ Decrease ☐ Hold ☐ Pause	
Meta; Threads (Organic)	$	$	$	%		☐ Increase ☐ Decrease ☐ Hold ☐ Pause	
Experimentation Bucket	$	$	$	%		☐ Increase ☐ Decrease ☐ Hold ☐ Pause	
Other Channel	$	$	$	%		☐ Increase ☐ Decrease ☐ Hold ☐ Pause	
TOTAL	**$**						

Month-end reallocation summary (document what moved and why):

Month: ___

Channel / Placement	Spend This Month	CAC	LTV	Conversion Rate	Attribution Source	Reallocation Decision	Note
Meta; Facebook Feed	$	$	$	%		☐ Increase ☐ Decrease ☐ Hold ☐ Pause	

Channel / Placement	Spend This Month	CAC	LTV	Conversion Rate	Attribution Source	Reallocation Decision	Note
Meta; Instagram Feed	$	$	$	%		☐ Increase ☐ Decrease ☐ Hold ☐ Pause	
Meta; Instagram Stories/Reels	$	$	$	%		☐ Increase ☐ Decrease ☐ Hold ☐ Pause	
Meta; Threads (Organic)	$	$	$	%		☐ Increase ☐ Decrease ☐ Hold ☐ Pause	
Experimentation Bucket	$	$	$	%		☐ Increase ☐ Decrease ☐ Hold ☐ Pause	
Other Channel	$	$	$	%		☐ Increase ☐ Decrease ☐ Hold ☐ Pause	
TOTAL	**$**						

Month-end reallocation summary:

Month: ___

Channel / Placement	Spend This Month	CAC	LTV	Conversion Rate	Attribution Source	Reallocation Decision	Note
Meta; Facebook Feed	$	$	$	%		☐ Increase ☐ Decrease ☐ Hold ☐ Pause	
Meta; Instagram Feed	$	$	$	%		☐ Increase ☐ Decrease ☐ Hold ☐ Pause	
	$	$	$	%			

Channel / Placement	Spend This Month	CAC	LTV	Conversion Rate	Attribution Source	Reallocation Decision	Note
Meta; Instagram Stories/Reels						☐ Increase ☐ Decrease ☐ Hold ☐ Pause	
Meta; Threads (Organic)	$	$	$	%		☐ Increase ☐ Decrease ☐ Hold ☐ Pause	
Experimentation Bucket	$	$	$	%		☐ Increase ☐ Decrease ☐ Hold ☐ Pause	
Other Channel	$	$	$	%		☐ Increase ☐ Decrease ☐ Hold ☐ Pause	
TOTAL	**$**						

Month-end reallocation summary:

Section 6: Starter Budget Split Calculator

Use this worksheet to turn any total starter budget into a dollar breakdown across the six line items, using the same percentages set in Section 1. Enter your total budget once, then work down the column. If you adjusted the Section 1 percentages, use your adjusted figures here so the two stay in sync.

Total Starter Budget: $ __ (call this the base figure)

Line Item	% of Total	How to Calculate	Your Dollar Amount
Content Production & Creative	50%	Total × 0.50	$
Paid Social; Meta	25%	Total × 0.25	$
Tools & Software	10%	Total × 0.10	$

Line Item	% of Total	How to Calculate	Your Dollar Amount
Analytics & Attribution	Included in Tools	(starter only; broken out at growth and enterprise)	Included above
Experimentation Reserve	10%	Total × 0.10	$
Agency / Reporting Overhead	5%	Total × 0.05	$
TOTAL	**100%**	Must equal your base figure	**$**

> **Worked example at $10,000:** Content Production $5,000 · Paid Social $2,500 · Tools & Software $1,000 · Experimentation Reserve $1,000 · Agency / Reporting Overhead $500. Total $10,000.

Growth note: At the growth stage, Analytics & Attribution becomes its own line (5%) and the other percentages shift as shown in Section 1: Content Production 35%, Paid Social 35%, Tools 10%, Analytics & Attribution 5%, Experimentation Reserve 10%, Agency / Reporting 5%. Run the same multiply-down-the-column method against your growth total.

Enterprise note: At the enterprise stage, Analytics & Attribution becomes its own line (10%) and the other percentages shift as shown in Section 1: Content Production 30%, Paid Social 40%, Tools 10%, Analytics & Attribution 10%, Experimentation Reserve 5%, Agency / Reporting 5%. Run the same multiply-down-the-column method against your enterprise total.

Check your work: Add every dollar amount in the column. If the total does not match your base figure exactly, one line is off. Reconcile before you commit the budget.

Section 7: Agency / In-House Brief Summary

Use this section to document what each budget line actually buys in people, deliverables, and time. Blur the line between ad spend and management fees and your reporting stops making sense.

Retainer Scope

Scope Item	Detail
Retainer Type	☐ Agency ☐ Freelance ☐ In-House Team ☐ Hybrid
Monthly Retainer Amount	$
Retainer Covers	☐ Content production only ☐ Media management only ☐ Both
Contract Term	
Point of Contact	

Production Deliverables Per Month

Deliverable Type	Quantity Per Month	Platform(s)	Owner (Agency / In-House)
Short-form video (Reels / Stories format)		Facebook / Instagram / Threads	
Static image posts			
Carousel posts			
Long-form or link posts			
Copy and caption writing		All channels	
Creative testing variants (A/B)			
Other:			

Media Management Fee Structure

> **Reminder:** The media management fee is what you pay an agency or specialist to run your Meta campaigns. It is separate from the ad spend dollars that go directly into Meta. Keep these as distinct line items in your budget and reporting.

Fee Item	Structure	Monthly Amount
Meta Campaign Setup & Optimization	☐ Flat fee ☐ % of ad spend ☐ Hourly	$
Audience Management & Testing	☐ Included in above ☐ Separate	$
Creative Trafficking & Asset Management	☐ Included ☐ Separate	$
Total Media Management Fee		$
Total Paid Social Ad Spend (to Meta)		$
Combined Paid Social Line Total		**$**

Reporting Cadence

Report Type	Frequency	Recipient(s)	Metrics Covered
Campaign Pacing Check	Weekly		Spend rate, CTR, cost-per-result vs. target
CAC / LTV Performance Report	Monthly		CAC by channel, LTV by acquisition source, attributed revenue
Creative Performance Review	Monthly		Conversion rate by asset, organic vs. paid signal comparison
Reallocation Decision Meeting	Monthly		Section 5 log review; budget shifts approved or denied

Report Type	Frequency	Recipient(s)	Metrics Covered
Quarterly Trend Review	Quarterly		LTV trends, CAC trajectory, 70/20/10 tier performance

Additional scope notes:

Footer: When to Shift Budget from Content into Paid

This note explains how to use Section 3 in practice.

Do not move dollars from your content production budget into paid social based on time elapsed, gut feel, or stakeholder pressure. Move them when the three signal thresholds in Section 3 are all met:

1. **CTR signal:** At least two organic posts have hit or exceeded your CTR target.
2. **Cost-per-result signal:** At least one boosted post has returned a cost-per-result at or below your CAC target.
3. **Attribution signal:** At least one confirmed conversion path runs through the social channel, verified by Meta Pixel, Conversions API, or UTM-matched CRM data.

When all three are confirmed, you are no longer buying distribution for an unproven asset. You are buying more reach for something that already converts. That is the only time paid amplification on Meta earns its cost.

If one or more signals are absent, the right move is to reinvest in content production, meaning more creative angles and more organic tests, and recheck after the next posting cycle.

The sequence never changes. Content proves the creative. Paid scales the winners.
