

Holiday Social Media Production & Approval Workflow Template

Publisher: Sociallyin | **Year:** 2026 | **For:** Directors of Social, VP Brand, CMO

How to Use This Template

This template is a working operations document, not a strategy deck. Fill it in once during Q2-Q3 planning, then use it as the single source of truth for every approval, deadline, and KPI conversation through January.

Each section is designed to be printed or shared as a standalone page. You do not need to use every section on day one. Start with the Phase Timeline Grid and the Approval Gate Log, then add the other trackers as your team ramps production.

Recommended setup steps:

1. Copy this template into your project management tool or a shared doc.
2. Assign every named role (see Role Definitions below) before the Q2 strategy lock.
3. Set gate deadlines on your team calendar the same day you assign roles.
4. Review the Reactive Content Checklist with all gate owners before October so no one is reading it for the first time during a trend moment.

Role Definitions

Every gate and task row in this template references one of four roles. Assign a real name to each before production begins. If one person holds two roles, flag it as a risk; both roles carry blocking authority at different gates.

Role	Responsibilities	Gate Ownership	Typical Title
Social Lead	Sets strategy, owns content calendar, manages creator briefs, reports KPIs	Gate 1 (creative review)	Director of Social, Social Media Manager
Creative Producer	Delivers all assets on the 6-4-2 cadence, manages file	Production milestones	

Role	Responsibilities	Gate Ownership	Typical Title
	handoffs, tracks spec compliance		Senior Content Producer, Creative Strategist
Legal / Brand Reviewer	Reviews all copy, visuals, and claims for legal and brand compliance; holds 48-hour SLA	Gate 2 (legal/brand)	Brand Director, In-House Counsel, Brand Compliance Lead
Channel Manager	Schedules approved assets in platform tools, owns publishing and monitoring during peak	Gate 3 (final scheduling)	Social Media Coordinator, Paid Social Manager

Escalation rule: Any asset that misses its gate deadline escalates to the VP of Brand or CMO; it does not return to the queue. Name that person here before production begins.

Escalation owner: _____

Phase Timeline Grid

Fill in the week-ending dates in the header row for your actual calendar year. Each task row lists the responsible role in parentheses.

Phase 1; Strategy & Budget Lock (Q2-Q3)

Task	Role	Target Week	Status	Notes
Confirm platform tier assignments (Tier 1 / 2 / 3)	Social Lead	Week of: —	☐	
Lock total holiday budget and split by tier	Social Lead + CMO	Week of: —	☐	
Draft and send creator briefs to all Q4 influencers	Social Lead	Week of: —	☐	

Task	Role	Target Week	Status	Notes
Sign influencer contracts with paid usage rights	Social Lead + Legal	Week of: —	☐	
Define all campaign KPIs per phase (use KPI table, p. 7)	Social Lead	Week of: —	☐	
Confirm Gate 2 reviewer and 48-hr SLA in writing	Social Lead + Legal	Week of: —	☐	
Finalize asset spec requirements per platform	Creative Producer	Week of: —	☐	
Build pre-approved reactive asset library (logos, backgrounds, caption templates)	Creative Producer	Week of: —	☐	

Phase 2; Early Awareness Window (October)

Task	Role	Target Week	Status	Notes
Publish Pinterest Idea Pins and gift guide boards (organic seeding)	Channel Manager	Week of: —	☐	
Deliver all Tier 2 drafts to Creative Producer	Creative Producer	Week of: —	☐	
Complete platform spec review for all Tier 1 assets	Creative Producer	6 wks before post date	☐	
Deliver finished Tier 1 assets for Gate 1	Creative Producer	4 wks before post date	☐	
Hand off Tier 2 drafts to Social Lead	Creative Producer	4 wks before post date	☐	
Complete Gate 1 review for all October content	Social Lead	4 wks before post date	☐	
Complete Gate 2 review for all October content	Legal/Brand Reviewer	2 wks before post date	☐	

Task	Role	Target Week	Status	Notes
Schedule Tier 1 assets in platform tools	Channel Manager	2 wks before post date	☐	
Confirm reactive library is cleared and accessible	Social Lead	2 wks before Nov 1	☐	
Publish early Instagram and TikTok awareness content	Channel Manager	Week of: __	☐	
Report October awareness KPIs (weekly dashboard)	Social Lead	Every Friday in Oct	☐	

Phase 3; Peak Conversion Window (Early November - December 25)

Task	Role	Target Week	Status	Notes
Activate paid amplification on Tier 1 platforms	Channel Manager	Week of: __	☐	
Launch Black Friday creative (pre-approved)	Channel Manager	Week of: __	☐	
Launch Cyber Monday creative (pre-approved)	Channel Manager	Week of: __	☐	
Begin daily KPI pulse reporting for executive sponsor	Social Lead	BF week through Dec 25	☐	
Layer Pinterest Shopping Ads on high-save Idea Pins	Channel Manager	Week of: __	☐	
Launch Christmas week creative (pre-approved)	Channel Manager	Week of: __	☐	
Monitor UGC and reactive content queue daily	Social Lead	Nov 1 - Dec 25	☐	

Phase 4; January Continuation (Q5 and Beyond)

Task	Role	Target Week	Status	Notes
Keep paid campaigns live (self-gifting, gift card, loyalty)	Channel Manager	Jan 1 – Jan 31	☐	
Launch gift card redemption campaign assets	Channel Manager	Week of: __	☐	
Publish self-gifting ad copy variants (see p. 8)	Channel Manager	Week of: __	☐	
Run January reactivation giveaway mechanic	Social Lead	Week of: __	☐	
Collect UGC from January buyers for Q1 recycling	Social Lead	Jan 1 – Jan 31	☐	
Deliver full post-holiday readout	Social Lead	Week of: __	☐	
Report January KPIs (weekly summary)	Social Lead	Every Friday in Jan	☐	

6-4-2 Batching Cadence Tracker

Use this tracker to confirm which assets are due at each countdown milestone. Fill in actual calendar dates in the "Due Date" column. The "Platform" and "Asset Type" columns are pre-populated with defaults; adjust to match your campaign.

Rule: No asset enters a gate review unless it meets the spec requirements listed on the Platform Asset Spec page. The Creative Producer signs off on spec compliance before any handoff.

6 Weeks Out; Brief, Concept Lock, Spec Review

All items below must be complete before any production work begins on the asset.

Asset Type	Platform	Responsible	Due Date	Spec Reviewed?	Brief Sent?	Status
Hero Reel concept (original)	Instagram	Creative Producer	—	☐	☐	
Hero short-form video concept (original)	TikTok	Creative Producer	—	☐	☐	
Creator brief; all influencers	Instagram + TikTok	Social Lead	—	☐	☐	
Paid creative concept; Black Friday	Instagram + Facebook	Creative Producer	—	☐	☐	
Paid creative concept; Cyber Monday	Instagram + TikTok	Creative Producer	—	☐	☐	
Gift guide Idea Pins	Pinterest	Creative Producer	—	☐	☐	
Repurpose plan for YouTube Shorts	YouTube	Creative Producer	—	☐	☐	
LinkedIn year-in-review draft (B2B only)	LinkedIn	Social Lead	—	☐	☐	
Reactive asset library (backgrounds, logos, templates)	All platforms	Creative Producer	—	☐	☐	

4 Weeks Out; Finished Tier 1 Assets to Gate 1; Tier 2 Drafts Delivered

All Tier 1 assets must be fully produced and handed off to Gate 1. Tier 2 drafts must be in review.

Asset Type	Platform	Tier	Responsible	Due Date	Delivered to Gate 1?	Status
Finished hero Reel	Instagram	1	Creative Producer	—	☐	
Finished hero TikTok video	TikTok	1	Creative Producer	—	☐	
Black Friday paid creative (all variants)	Instagram + Facebook	1	Creative Producer	—	☐	
Cyber Monday paid creative (all variants)	TikTok + Instagram	1	Creative Producer	—	☐	
Story retargeting sequence (3-frame)	Instagram	1	Creative Producer	—	☐	
Repurposed Reels cut for Shorts	YouTube	2	Creative Producer	—	☐	
Facebook retargeting video (repurposed)	Facebook	2	Creative Producer	—	☐	
Pinterest Idea Pins (September seed set)	Pinterest	2	Creative Producer	—	☐	

2 Weeks Out; Gate 2 Complete; Tier 1 Assets Scheduled; Reactive Library Cleared

Nothing ships that has not cleared Gate 2. The Channel Manager confirms scheduling in platform tools before this row is marked complete.

Asset Type	Platform	Gate 2 Complete?	Scheduled in Tool?	Reactive Library Cleared?	Channel Manager Sign-Off	Status
Hero Reel	Instagram	☐	☐	N/A	—	
Hero TikTok	TikTok	☐	☐	N/A	—	
Black Friday paid creative	Instagram + Facebook	☐	☐	N/A	—	
Cyber Monday paid creative	TikTok + Instagram	☐	☐	N/A	—	
Story retargeting sequence	Instagram	☐	☐	N/A	—	
All reactive templates	All platforms	☐	N/A	☐	—	
Christmas week assets	All Tier 1 + 2	☐	☐	N/A	—	
January continuation assets	All Tier 1 + 2	☐	☐	N/A	—	

Approval Gate Log

This log is the single record of every asset's approval status. One row per asset. Update in real time; do not batch-update at end of week.

Gate definitions: - **Gate 1; Creative Review:** Social Lead confirms the asset meets the brief, platform spec, and campaign strategy. SLA: 24 hours from receipt. - **Gate 2;**

Status codes: Pending / In Review / Approved / Revisions Required / Escalated

[illegible]

Reactive Content Go / No-Go Checklist

Asset or moment being considered: _____

Date / Time:

Reviewed by (Social Lead): _____

Reviewed by (Brand Reviewer): _____

Hard Stop Questions; Any "No" = Do Not Publish

#	Question	Yes	No	Notes
1	Is this trend or moment free of political, religious, or social controversy?	☐	☐	
2	Does this content make zero unverified claims about our products, competitors, or third parties?	☐	☐	
3	Does this content avoid naming, implying, or visually referencing any competitor?	☐	☐	
4	Is all audio, music, and visual content either owned by us, licensed, or confirmed royalty-free for commercial use?	☐	☐	
5	Has the brand reviewer confirmed this content meets all brand standards (logo use, color, tone)?	☐	☐	

Judgment Questions; Discuss Any "No" Before Proceeding

#	Question	Yes	No	Notes
6	Can this content be produced and published within 3 hours using only pre-cleared templates from the reactive library?	☐	☐	
7	Does this moment have a clear, direct connection to our brand, product, or audience; not just a general cultural reference?	☐	☐	
8	Is the trend still actively gaining traction (not already peaked or associated with backlash)?	☐	☐	

Final decision:

- ☐ **Go;** All 5 hard stop questions answered Yes; judgment questions reviewed and discussed.
- ☐ **No-Go;** One or more hard stop questions answered No. Do not produce.
- ☐ **Hold for escalation;** Judgment questions raised concerns; escalating to: _____

Approved by: _____ Time of approval: _____

Platform Asset Spec Quick Reference

All dimensions, length limits, and caption character counts current as of 2026. Verify against each platform's official help center before the Q3 production sprint; specs change without notice. The Creative Producer is responsible for confirming specs at the 6-weeks-out milestone.

Instagram Reels

Spec	Requirement
Aspect ratio	9:16 (vertical)
Recommended resolution	1080 × 1920 px
Maximum video length	90 seconds
Minimum video length	3 seconds
File format	MP4 or MOV
Maximum file size	1 GB
Caption character limit	2,200 characters (first 125 visible before truncation)
Safe zone (text / logos)	Keep all key elements within center 1080 × 1420 px to avoid UI overlap
Audio	Required for algorithmic reach; use licensed audio or original audio
Hashtag recommendation	3–5 targeted hashtags; avoid hashtag stuffing

TikTok (Feed Video)

Spec	Requirement
Aspect ratio	9:16 (vertical); 1:1 and 16:9 also accepted
Recommended resolution	1080 × 1920 px
Maximum video length	10 minutes (organic); Spark Ads: up to 60 seconds recommended

Spec	Requirement
Optimal length for engagement	21–34 seconds
File format	MP4 or MOV
Maximum file size	287.6 MB
Caption character limit	2,200 characters (150 characters show before truncation on feed)
Safe zone	Keep text within center 80% of frame; avoid bottom 20% (UI overlap)
Audio	On-platform sounds required for Spark Ads; confirm usage rights on all audio
Hashtag recommendation	3–5; include one branded hashtag during holiday campaigns

Facebook Video (Feed + Reels)

Spec	Requirement
Aspect ratio	9:16 (Reels), 4:5 or 1:1 (feed video)
Recommended resolution	1080 × 1920 px (Reels); 1080 × 1350 px (4:5 feed)
Maximum video length	90 seconds (Reels); 240 minutes (feed video; not recommended for paid)
File format	MP4 or MOV
Maximum file size	4 GB
Caption character limit	63,206 characters (first 477 visible before "See more")
Safe zone	Keep text within center 80% of frame
Audio	Captions strongly recommended; majority of feed views are muted
Paid note	

Spec	Requirement
	Meta Advantage+ placements may crop to 1:1; test all assets at both ratios

Pinterest Idea Pins

Spec	Requirement
Aspect ratio	9:16 (video); 1:1 or 2:3 (static)
Recommended resolution	1080 × 1920 px (video); 1000 × 1500 px (static)
Maximum video length	60 seconds per page; up to 20 pages per Idea Pin
File format	MP4 or MOV (video); JPG or PNG (static)
Maximum file size	100 MB (video per page)
Title character limit	100 characters
Description character limit	500 characters
Safe zone	Keep key text and branding in top and bottom 10% clear of UI elements
Shopping note	Tag products directly using Pinterest Product Pins for Shopping Ad eligibility

YouTube Shorts

Spec	Requirement
Aspect ratio	9:16 (vertical)
Recommended resolution	1080 × 1920 px
Maximum video length	3 minutes
Optimal length	Under 60 seconds for Shorts feed placement

Spec	Requirement
File format	MP4 or MOV
Maximum file size	256 GB or 12 hours
Title character limit	100 characters
Description character limit	5,000 characters
Safe zone	Keep all text and logos within center 1080 × 1566 px
Repurpose note	Remove TikTok watermarks before uploading; watermarked content is suppressed

LinkedIn (Video + Single Image Posts)

Spec	Requirement
Aspect ratio	1:1 (square preferred for feed); 16:9 (landscape); 9:16 (vertical)
Recommended resolution	1920 × 1920 px (1:1); 1920 × 1080 px (16:9)
Maximum video length	10 minutes (organic); 30 minutes (sponsored)
Optimal video length	30–90 seconds for holiday content
File format	MP4
Maximum file size	5 GB
Post character limit	3,000 characters (first 210 visible before "See more")
Article character limit	125,000 characters
Hashtag recommendation	3–5; use industry and role-specific hashtags
Paid note	Thought Leader Ads allow boosting personal posts; useful for year-in-review content

KPI Tracking Table

Assign one owner per metric. "Target Benchmark" should be filled in during Q2–Q3 strategy lock based on prior year performance or industry benchmarks relevant to your category. "Actual Result" is updated at the end of each phase.

Metric Name	Phase	Platform(s)	Target Benchmark	Actual Result	Owner	Reporting Cadence
Reach	October awareness	All organic	—	—	Social Lead	Weekly
Follower growth (net)	October awareness	Instagram, TikTok	—	—	Social Lead	Weekly
Saves	October awareness	Instagram, Pinterest	—	—	Social Lead	Weekly
Impressions	October awareness	All	—	—	Social Lead	Weekly
Share rate	October awareness	TikTok, Facebook	—	—	Social Lead	Weekly
Video completion rate	Early November consideration	Instagram, TikTok, YouTube	—	—	Social Lead	Weekly
Add-to-cart rate	Early November consideration	Instagram, TikTok	—	—	Paid Media Lead	Weekly
Product page visits	Early November consideration	All paid	—	—	Paid Media Lead	Weekly
Click-through rate	Early November consideration	Facebook, Pinterest	—	—	Paid Media Lead	Weekly
Story tap-forward rate	Early November consideration	Instagram	—	—	Social Lead	Weekly

Metric Name	Phase	Platform(s)	Target Benchmark	Actual Result	Owner	Reporting Cadence
Return on ad spend (ROAS)	Black Friday / Cyber Monday peak	Instagram, TikTok, Facebook	—	—	Paid Media Lead	Daily (peak week)
Cost per acquisition (CPA)	Black Friday / Cyber Monday peak	Instagram, TikTok	—	—	Paid Media Lead	Daily (peak week)
Social commerce checkouts	Black Friday / Cyber Monday peak	Instagram, TikTok	—	—	Paid Media Lead	Daily (peak week)
Revenue attributed to social	Black Friday / Cyber Monday peak	All paid	—	—	CMO / Exec Sponsor	Daily (peak week)
Conversion rate by platform	Black Friday / Cyber Monday peak	All paid	—	—	Paid Media Lead	Daily (peak week)
Return on ad spend (ROAS)	Christmas week	Instagram, TikTok, Facebook	—	—	Paid Media Lead	Daily
Average order value	Christmas week	All social commerce	—	—	Paid Media Lead	Daily
Repeat purchase rate	Christmas week	Instagram, TikTok	—	—	Paid Media Lead	Daily
Cost per acquisition (CPA)	January continuation	All paid	—	—	Paid Media Lead	Weekly
Gift card redemption rate	January continuation	Instagram, Facebook	—	—	Channel Manager	Weekly
Loyalty sign-ups	January continuation	All	—	—	Social Lead	Weekly

Metric Name	Phase	Platform(s)	Target Benchmark	Actual Result	Owner	Reporting Cadence
Q5 social commerce revenue	January continuation	Instagram, TikTok, Pinterest	—	—	Paid Media Lead	Weekly
UGC volume (posts + tags)	January continuation	Instagram, TikTok	—	—	Social Lead	Weekly

Post-Holiday Continuation Planner

The buyer who checked out on December 22 is your cheapest January conversion. On Pinterest specifically, roughly 55% of weekly users keep buying online during "Q5," the week between Christmas and New Year's Day, which makes it the load-bearing platform for post-holiday activity. This planner maps the content angles, campaign slots, and ad copy variants that keep paid activity live through Q5 without requiring a full new production cycle.

January Content Angles

Use these angles to brief the Channel Manager on content themes. Each angle maps to a campaign slot below.

Content Angle	Platform Priority	Format	Brief Notes
Self-gifting; "You deserve it too" framing	Instagram, TikTok	Short-form video, carousel	Reframe holiday product as a personal treat, not a gift. Use same hero creative with updated caption.
Gift card redemption; "Spend what you got"	Instagram, Facebook	Static + video	Drive gift card holders to specific product categories. Tag products for social commerce.
New Year, new you; Aspirational framing without clichés	Instagram, TikTok	Reel, Story	Tie product benefit to a fresh start; be specific to

Content Angle	Platform Priority	Format	Brief Notes
			product, not generic resolution content.
Year-in-review / community appreciation	LinkedIn, Instagram	Carousel, long-form post	Highlight community, client wins, or brand milestones. Invite UGC by asking followers to share their own.
Loyalty and repeat purchase; "Welcome back"	Email + Facebook retargeting	Video, static	Target December buyers specifically. Offer early access or loyalty points, not another discount.
Q5 gift guide extension	Pinterest	Idea Pins, Shopping Ads	Keep gift guide boards live. Update top pins with January self-gifting captions.

Gift Card Redemption Campaign Slots

Campaign Slot	Recommended Dates	Platform	Asset Required	Status
Gift card launch post (organic)	December 26–28	Instagram, Facebook	Static or short video	☐
Gift card paid push (retargeting; Dec buyers)	December 27 – January 5	Facebook, Instagram	Static ad (repurpose hero)	☐
"Last chance to redeem" reminder	January 20–25	Instagram, TikTok	Story + feed post	☐
Category-specific gift card landing (e.g., "Use it on [product category]")	January 5–15	Instagram, Pinterest	Carousel or Idea Pin	☐

Self-Gifting Ad Copy Variants

Copy below is written as starting points. Customize product name, price point, and CTA to match your catalog. All variants are designed for short captions (under 125 characters visible before truncation).

Variant 1; Direct

You bought for everyone else. [Product name] is for you. Shop now →

Variant 2; Permission-based

The holidays are over. The "treat yourself" window is open. [Product name] →

Variant 3; Social proof angle (use only if you have a verified review count)

[X]+ people gave this to someone they love. Now it's your turn. [Product name] →

Variant 4; Gift card tie-in

Got a gift card? Here's exactly what to spend it on. [Product name] →

Variant 5; New Year framing (specific)

New year. Same you, but with [specific product benefit]. [Product name] →

Variant 6; Scarcity (use only if inventory genuinely limited)

Holiday stock is almost gone. [Product name]; grab yours before it sells out →

January Campaign Calendar Slots

Fill in actual post dates based on your platform scheduling tool.

Campaign	Platform	Copy Variant	Post Date	Asset Status	Owner
Self-gifting launch	Instagram, TikTok	Variant 1 or 2	—	☐ Scheduled	
Gift card redemption push	Facebook, Instagram	Variant 4	—	☐ Scheduled	
New Year framing post	Instagram, TikTok	Variant 5	—	☐ Scheduled	
Q5 Pinterest Shopping Ad activation	Pinterest	N/A (visual-first)	—	☐ Scheduled	
Loyalty reactivation retargeting	Facebook	Variant 3 or 6	—	☐ Scheduled	
January reactivation giveaway	Instagram	N/A (custom brief)	—	☐ Scheduled	
UGC collection CTA post	Instagram, TikTok	Custom	—	☐ Scheduled	
LinkedIn year-in-review (B2B only)	LinkedIn	Custom	—	☐ Scheduled	

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