HubSpot

Social Media Strategy Template

Goal Setting

When establishing the goals you are working towards and the key performance indicators (KPIs) that you will track for your social media campaign, it is important to consider the objectives of your business and overall marketing strategy.

Setting S.M.A.R.T. Goals

SMART, which stands for Specific, Measurable, Attainable, Relevant, and Time-bound, is a methodology that helps you establish concrete and achievable goals.

Goal 1

Goal	*Increase website traffic by 25% through social media referrals within the first 90 days of the campaign.*
Specific	*The goal clearly states what needs to be achieved.*
Measurable	*The goal can be quantified by measuring the percentage increase in website traffic.*
Attainable	*A 25% increase in website traffic through social media referrals is achievable considering past performance and optimization potential.*
Relevant	*The goal is relevant to the social media campaign's objective of driving website traffic.*
Time-bound	*The goal has a specific time frame of 90 days, providing a clear deadline for achieving the increase in website traffic.*

Goal 2

Goal	*Increase brand awareness by achieving 10,000 impressions on our campaign hashtag within the next 30 days.*
Specific	*The goal focuses on increasing a specific metric (brand awareness) through a specific metric (achieving 10,00 impressions on the campaign hashtag).*
Measurable	*The goal includes a quantifiable metric (10,000 hashtag impressions) which can be measured using social media analytics tools.*
Attainable	*The goal of achieving 10,000 hashtag impressions is realistic and attainable based on the campaign's estimated reach and audience size.*
Relevant	*Increasing brand awareness aligns with the social media campaign's objective and is relevant to overarching marketing goals.*
Time-bound	*The goal has a clear timeframe of 30 days, providing a specific deadline for achieving the targeted number of hashtag impressions.*

Determine KPIs

Key Performance Indicators (KPIs) are quantifiable metrics you'll use to gauge your strategy's success. Examples: Number of website visits that came from social profiles Number of followers or subscribers gained Number of newsletter sign-ups Number of shares per post Number of comments received per post.

	Key Performance Indicator	Target Metric	Tracking Frequency
KPI 1	*e.g., Reach or number of unique users reached*	*e.g., 500,000 unique users reached during the campaign period*	*e.g., Monthly*
KPI 2	*e.g., Engagement or likes, comments, and shares*	*e.g., 5,000 likes, comments, and shares combined during the campaign period*	*e.g., Weekly*
KPI 3	*e.g., Click-Through-Rate (CTR) or percentage of clicks on links*	*e.g., 3% of total audience clicks on campaign CTA link during the campaign period*	*e.g., Weekly*
KPI 4	*e.g., Return on Ad Spend (ROAS) or revenue generated per dollar spent on social media advertising*	*e.g., 400% ROAS, or $4 generated for every $1 spent on ads during the campaign period*	*e.g., Bi-Weekly*
KPI 5	*e.g., Follower Growth or increase in total social media followers*	*e.g., Gain 1,000 new followers during the campaign period*	*e.g., Monthly*

Audience and Competition

Developing a deep understanding of your audience and competition can help you lay a strong foundation for a strategic and impactful social media campaign that captures attention and fosters meaningful brand engagement.

Target Audience Identification

Your target audience's demographics, beliefs, hobbies, and goals should stay top of mind throughout your campaign. These prompts can help you get a sense of who your content is for.

Persona 1

Persona Name	*Create a fictional name that represents this persona.*
Gender	*Helps personalize content and improve ad targeting for relevancy and resonance.*
Location	*Targets specific regions for localized campaigns and audience relevance.*
Occupation	*Tailors content to align with professional interests and needs.*
Annual Income	*Determines affordability and buying behavior for more effective targeting and messaging.*
Interests and Hobbies	*Helps craft compelling content and engagement strategies.*
Preferred Social Media Platform	*Targets where audience spends most of their digital time for more effective reach.*
Frequency of Social Media Usage	*Optimizes timing and frequency of content publication.*
Pain Points and Challenges	*As related to your product or offering.*
Content Preferences	*What type of content do they engage with? What is their preferred tone and style of their preferred content?*
Purchase Behavior	*What factors influence their buying decisions? What other industries or brands do they purchase from?*

>   **FREE RESOURCE: How to Find Your Target Audience**   <

Competitor Research
Researching the competition can teach you about what works and what doesn't, or give you inspiration when you run into creative blocks. Try to get into the competitor's mind and ask yourself why they made certain social media decisions. Choose three competitor brands to analyze with these prompts.

Competitor 1

Competitor Name	*Name of the competitor being researched.*
Social Media Platforms	*List and/or link to the social media platforms where the competitor has a presence.*
Follower Count	*Number of followers or subscribers on each platform.*
Types of Content	*e.g., images, videos, or blog posts*
Frequency of Posting	*e.g., daily, weekly, etc.*
Audience Demographics	*General information about the competitor's core audience demographics.*
Top Performing Content	*List examples of their most engaging or most viral posts; analyze common themes or elements in successful content.*
Influencer Collaborations	*List any applicable partnerships or brand ambassadors.*
Opportunities and Threats	*Highlight potential opportunities and threads based on competitor's social media activities.*
Key Takeaways	*Summarize your learnings and lessons learned from competitor research.*

Competitor 2

Competitor Name	*Name of the competitor being researched.*
Social Media Platforms	*List and/or link to the social media platforms where the competitor has a presence.*
Follower Count	*Number of followers or subscribers on each platform.*
Types of Content	*e.g., images, videos, or blog posts*
Frequency of Posting	*e.g., daily, weekly, etc.*

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Influencer Collaborations	*List any applicable partnerships or brand ambassadors.*
Opportunities and Threats	*Highlight potential opportunities and threads based on competitor's social media activities.*
Key Takeaways	*Summarize your learnings and lessons learned from competitor research.*

Competitor 3

Competitor Name	*Name of the competitor being researched.*
Social Media Platforms	*List and/or link to the social media platforms where the competitor has a presence.*
Follower Count	*Number of followers or subscribers on each platform.*
Types of Content	*e.g., images, videos, or blog posts*
Frequency of Posting	*e.g., daily, weekly, etc.*
Audience Demographics	*General information about the competitor's core audience demographics.*
Top Performing Content	*List examples of their most engaging or most viral posts; analyze common themes or elements in successful content.*
Influencer Collaborations	*List any applicable partnerships or brand ambassadors.*
Opportunities and Threats	*Highlight potential opportunities and threads based on competitor's social media activities.*
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Selecting the Right Platforms

In an age where a new social media platform seems to pop up around every corner, it can be challenging to determine where your brand needs to be active and visible. Selecting the right social media platforms for your brand (and campaign) is vital to maximize reach and impact. Consider your target audience, available resources, and competitor's presence as you determine which platforms you are willing and able to leverage.

Platform 1

Platform Name	*Name of the platform you are considering for the campaign.*
Audience	*How does this platform align with or serve your target audience?*
Key Features	*What are the main features and strengths of this platform?*
Purpose	*How will this platform align with your campaign objectives?*
Types of Content	*What types of content will you be publishing on this platform? e.g., images, videos, blog posts, etc.*
Content Frequency	*How often will you publish content on this platform?*
Campaign KPIs	*What KPIs will you be tracking on this platform?*
Current Data	*List the current metrics for any relevant KPIs as well as the date they were captured.*

Platform 2

Platform Name	*Name of the platform you are considering for the campaign.*
Audience	*How does this platform align with or serve your target audience?*
Key Features	*What are the main features and strengths of this platform?*
Purpose	*How will this platform align with your campaign objectives?*
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Determining Your Content Strategy

Creating a well-defined content strategy is a fundamental step in any successful social media campaign. This process involves developing a deep understanding of your target audience's preferences, needs, and challenges. An informed content strategy lays the foundation for delivering valuable content that not only captures user attention but also drives meaningful connection and brand engagement.

> **TIP:** Use the following worksheet to explore ideas for content topics and content theme ideas. You can use resources like competitor analysis, user-generated content themes, and website traffic analytics to explore topic and theme ideas. <

Theme 1

Description	*Briefly describe the content theme and its relevance to the campaign.*
Target Audience	*Specify the personas or audience segment this theme addresses.*
Campaign Objectives	*How will this content theme contribute to achieving a specific campaign goal?*
Platform	*Which platforms will see the most success with content related to this theme?*
Content Types	*Identify the types of content suitable for this theme.*
Call to Action (CTA)	*Specify the desired action or goal for each content piece.*

Theme 2

Description	*Briefly describe the content theme and its relevance to the campaign.*
Target Audience	*Specify the personas or audience segment this theme addresses.*
Campaign Objectives	*How will this content theme contribute to achieving a specific campaign goal?*
Platform	*Which platforms will see the most success with content related to this theme?*
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Theme 3

Description	Briefly describe the content theme and its relevance to the campaign.
Target Audience	Specify the personas or audience segment this theme addresses.
Campaign Objectives	How will this content theme contribute to achieving a specific campaign goal?
Platform	Which platforms will see the most success with content related to this theme?
Content Types	Identify the types of content suitable for this theme.
Call to Action (CTA)	Specify the desired action or goal for each content piece.

Theme 4

Description	Briefly describe the content theme and its relevance to the campaign.
Target Audience	Specify the personas or audience segment this theme addresses.
Campaign Objectives	How will this content theme contribute to achieving a specific campaign goal?
Platform	Which platforms will see the most success with content related to this theme?
Content Types	Identify the types of content suitable for this theme.
Call to Action (CTA)	Specify the desired action or goal for each content piece.

Engagement and Community Management

Community engagement and management strategies are essential pillars of a successful social media strategy. By prioritizing engagement and community building, brands are able to foster brand advocacy, improve customer retention and loyalty, and foster a positive brand reputation.

Engagement and Moderation Strategies

Content Interactions	*Define your planned approach for handling likes, comments, and shares. Be sure to plan for how you will respond to questions, comments, and feedback—both positive and negative.*
Comment Moderation	*Plan for addressing conflicts or negative comments in a way that aligns with your brand tone and business goals.*
User Engagement	*Outline strategies for how you will encourage content sharing and positive content engagement.*
Polls and Surveys	*Determine if polls and surveys are relevant to meeting your campaign goals. How will you run them in a way that will improve engagement?*
User-Generated Content (UGC)	*Establish guidelines for collecting, sharing, and reposting UGC. Determine criteria for approving or rejecting user-generated content.*

Cross-Departmental Collaboration

Customer Service	*Coordinate with the customer support team to create a unified response strategy. Foster open communication channels between the social media and customer service teams to share insights, feedback, and trends.*
Sales	*Collaborate on lead generation strategies to ensure social media interactions align with sales objectives. Share customer insights and feedback gathered from social media interactions to aid sales strategies.*
Product Development	*Seek input from the product development team on potential content ideas or features that resonate with the audience. Use social media to gather user feedback on existing products or to test new offerings.*
Public Relations	*Coordinate crisis communication plans to address potential social media crises and reputation management. Leverage social media to amplify PR efforts and engage with media and influencers.*

Analytics and Measurement

Social media analytics provide a deeper understanding of user behavior and overall campaign impact, enabling brands to make smarter, better-informed decisions about developing content strategies that will resonate with audiences. By using an analytical lens, social media can become a powerful tool for enhancing brand visibility and achieving campaign objectives.

Social Media Metrics Tracker

Platform	Date Range	Followers	Engagements	Views	CTA CTR
e.g., Facebook	06/01-06/30	1,200 (+200)	10,200 (+34%)	16,200 (+13%)	4.5%

Social Media Audit

After each campaign (as well as before and during, if you wish), conduct an audit of your social media accounts to track your KPIs and tweak your strategy as necessary.

Timing and Frequency	How often will you conduct a social media audit? (Ex: 1x/month, after each campaign, etc.)
Platforms	Which platforms are performing well for your strategy?
User Engagement	What engagement strategies are working well? How quickly are you responding to comments, messages, and other inquiries?
Successful Content	What types of content are working based on your campaign's KPIs?
Unsuccessful Content	What types of content are underperforming based on your campaign's KPIs?
Top Performing Posts	What are the top-performing posts from your most recent campaign?
Emerging Trends and Opportunities	Are there any emerging social media trends or features that you should consider leveraging moving forward in your strategy?

> **FREE RESOURCE: How to Conduct a Social Media Audit** <