

# Social Media Marketing Strategy — Workbook

This workbook turns the course into a working social media operation for one real business account. As you complete it you will set a measurable objective, score and choose your platforms, build content pillars and a quarter of planned posts, document a community-management and crisis playbook, and stand up UTM tracking that lets you calculate a defensible ROI. The templates give you a platform scorecard, a content calendar, a community-response guide, and an ROI dashboard so the whole strategy lives in one place and the numbers are decided before you report them.

## Strategy and Choosing the Right Platforms

Lock one measurable objective and commit to the two or three platforms that fit your audience and your capacity.

### Exercise: Write Your One Objective as a SMART Goal

Pick a single primary objective from the five honest objectives (awareness, engagement, traffic, leads, or direct sales) and rewrite it as a specific, measurable, time-bound goal for the next 90 days. This goal will drive every later decision in the workbook.

- What is the one primary objective this channel must achieve, and why that one over the others?  
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- State it as a SMART goal with a starting number, a target number, and a 90-day deadline.  
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- What single metric, if it moved, would make this quarter a clear success?  
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- What is your secondary objective, and how will you keep it from competing with the primary one?  
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### Worksheet: Customer-to-Platform Map

Describe one specific real customer, then map them to where they actually spend attention. Fill this for your single most valuable customer type before scoring any platforms.

Customer age range and role or life stage  
\_\_\_\_\_  
\_\_\_\_\_

The core problem you solve for them  
\_\_\_\_\_  
\_\_\_\_\_

Two or three platforms they realistically use daily  
\_\_\_\_\_  
\_\_\_\_\_

How your last three or four best customers actually found you  
\_\_\_\_\_  
\_\_\_\_\_

Best native format to show your offer (short video, image, carousel, long video, text)  
\_\_\_\_\_  
\_\_\_\_\_

Evidence competitors and customers are active on each candidate platform  
\_\_\_\_\_  
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## Worksheet: Weighted Platform Scorecard

Score each candidate platform 1 to 5 on the five criteria, then double audience fit and capacity fit before totaling. Commit to the top one or two as primary and secondary.

Platform name

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Audience fit score 1-5 (weight x2)

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Content fit score 1-5

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Competitive proof score 1-5

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Capacity fit score 1-5 (weight x2)

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Objective fit score 1-5

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Weighted total

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Decision: primary, secondary, or not this quarter

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### Checklist: Platform Commitment Gate

- Named one primary objective and wrote it as a SMART goal with numbers and a date
- Described one specific real customer rather than a vague audience
- Scored every candidate platform with audience fit and capacity fit doubled
- Committed to no more than two platforms (three only if you have a team)
- Wrote the one-sentence commitment naming what you are NOT starting this quarter
- Set a re-evaluation date at the end of the 90 days

## Content Calendars and Consistent Creation

Define content pillars, set a sustainable cadence, and build a batchable calendar that ships even on a bad week.

### Exercise: Define Your Three to Five Content Pillars

Find the overlap between what your audience wants and what you can credibly talk about, then name three to five recurring pillars and assign a posting ratio. Keep direct promotion to roughly one post in ten.

- List the top problems, questions, and outcomes your audience cares about.

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- List what you can credibly speak to: expertise, process, story, offers.

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- Name three to five pillars from the overlap, and confirm at least one educates, one builds personality, and only one sells.

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- Assign a rough ratio across pillars (for example 40 percent educational, 30 percent personality, 20 percent social proof, 10 percent promotion).

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## Worksheet: Cadence and Weekly Slot Plan

Set a posting cadence you can keep on your worst week, then assign each weekly slot to a pillar so the week stays balanced. Fill this for one representative week.

Sustainable feed posts per week (be honest about a bad week)

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Stories or short-form posts per week, if applicable

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Slot 1 day and assigned pillar

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Slot 2 day and assigned pillar

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Slot 3 day and assigned pillar

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Scheduling tool you will commit to (e.g. Meta Business Suite, Buffer, Later, Metricool)

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Audience peak times pulled from your own platform analytics

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## Exercise: Plan a 40-Post Backlog by Pillar

Brainstorm roughly ten post ideas per pillar in one sitting to create a backlog the calendar can draw from, then map the next month onto specific dates including business events.

- Write ten post ideas for each pillar (aim for about 40 total).
  - Which business events, launches, or seasonal peaks fall in the next 90 days, and what content do they need?
  - Which roughly 20 percent of slots will you leave open for timely or reactive content?
  - Which five evergreen posts will you pre-make as a buffer for bad weeks?
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## Checklist: Batch and Ship Readiness

- Defined three to five named content pillars with a posting ratio
- Set a cadence sustainable on your worst week, not your best
- Built a backlog of about 40 post ideas across the pillars
- Blocked a protected batch session on the calendar and silenced notifications for it
- Chose one scheduling tool and loaded at least two weeks ahead
- Identified one core piece to repurpose into at least four posts across platforms
- Parked five evergreen buffer posts in the scheduler

## Organic Growth and the Algorithm

Earn unpaid reach by building for saves and shares, writing strong hooks, and using native formats and discovery well.

### Worksheet: Pre-Publish Distribution Check

Run every important post through the signals the algorithm rewards before it goes out. Fill this for one upcoming flagship post.

Is this genuinely worth saving, and why

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Would someone share or send this to a friend, and why

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What specific question or call to action invites a comment or reply

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Hook (first line or opening frame) and which hook pattern it uses

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Native format chosen and why it fits what the platform is currently pushing

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Searchable keywords said aloud in video and written in the caption

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### Exercise: Write Five Hooks for One Idea

Take a single post idea and write five different hooks using five different patterns (the mistake, the number, the contrarian take, the result, the question or curiosity gap). Pick the strongest and note why.

- What is the single idea or value of the post in one sentence?
  - Write one hook each using the mistake, the number, the contrarian take, the result, and a question or curiosity gap.
  - Which hook would most likely stop your specific customer in the first three seconds, and why?
  - What call to action at the end matches your primary objective (save, share, comment, or click)?
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### Worksheet: Discovery and Hashtag Stack

Build a focused discovery stack rather than dumping maximum hashtags. Fill this for your primary platform. Two or three broad hashtags for reach

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Several niche hashtags where your post can realistically be seen

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One branded hashtag for your community

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Keywords to include in captions and on-screen text for search

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One complementary account to collaborate with for borrowed reach

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One evergreen, searchable piece to create for compounding traffic (e.g. a how-to for YouTube or Pinterest)

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## Checklist: Organic Growth Gate

- Designed the post to earn at least one of: a save, a share, or a comment
- Wrote and tested several hooks and chose the strongest
- Prioritized short-form vertical video where growth is the objective
- Ended the post with a call to action that matches the objective
- Added searchable keywords in caption, on-screen text, and alt text
- Gave viewers a clear reason to follow and a path to an owned audience (email or community)
- Reviewed last month's three best posts and noted what to repeat

## Community Management and Measuring ROI

Document response standards and a crisis playbook, set up UTM tracking, and calculate a defensible ROI you can present.

### Worksheet: Community-Response Standards

Document the standards that keep replies fast, consistent, and on-brand even when different people answer. Fill this once and share it with anyone who manages the account.

Target response time for comments during business hours

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Target response time for DMs

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Brand voice in three or four adjectives, with one do and one do-not example

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Saved replies for your three most common questions (hours, pricing, how to book)

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Daily proactive engagement habit (who, how long, on which accounts)

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How buying questions get routed toward the objective (e.g. move to DMs)

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### Exercise: Draft Your Negativity and Crisis Playbook

Decide how you will respond to complaints, trolls, and a rare crisis before any of them happens, so an emotional moment does not become a public mistake.

- Write your public-then-private response template for a genuine complaint (acknowledge, apologize, act).

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- What is your written rule for trolls and bad-faith attacks (hide, mute, block) and what you will never delete?

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- Who handles a serious issue, and at what point do leadership or legal get looped in?

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- Write a calm holding-statement template and name who pauses scheduled posts during a sensitive moment.

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### Exercise: Set Up Tracking, Then Calculate and Report ROI

First stand up the measurement plumbing: define a UTM naming convention for source, medium, and campaign, tag every social link, route traffic through a link-in-bio page or shortener, connect Google Analytics 4, and define the conversions that count (purchase, booking, form submit, qualified DM). Then use the ROI formula (value gained minus cost, divided by cost) with honestly valued time, tools, and ad spend, and summarize it for a decision-maker on one page.

- Write your UTM naming convention and confirm every social link is tagged and routed through one link tool.

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- Total your monthly social cost: hours valued at an honest rate, plus tools, plus any ad spend.
  - Total the value social drove this month: conversions times their value, traced via UTM and GA4.
  - Compute ROI as (value minus cost) divided by cost as a percentage, then write the one-sentence result an owner can act on plus what you will do more and less of next month.
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### Checklist: Measurement and Reporting Gate

- Documented response-time standards and a short brand-voice guide
- Wrote a complaint, troll, and crisis playbook before needing it
- Tagged every social link with UTM parameters and a naming convention
- Connected web analytics and defined the conversions that matter
- Calculated ROI using honestly valued time, tools, and ad spend
- Built a one-page monthly dashboard with objective metric, reach, clicks, conversions, and ROI
- Noted next month's do-more and do-less based on the data

### Your Action Plan

1. Write your single primary objective as a SMART goal with a starting number, target, and 90-day deadline.
2. Score every candidate platform with audience fit and capacity fit doubled, then commit to one primary and at most one secondary.
3. Define three to five content pillars and assign a posting ratio that keeps direct promotion to about one post in ten.
4. Set a cadence you can keep on your worst week and assign each weekly slot to a pillar.
5. Brainstorm a backlog of about 40 post ideas and schedule at least two weeks ahead in one chosen tool.
6. Run a protected batch session: produce, edit, and schedule a block of content, repurposing one core piece into at least four posts.
7. Build every flagship post for saves and shares, lead with a tested hook, and end with a call to action that matches your objective.
8. Document community-response standards plus a complaint, troll, and crisis playbook, and share them with anyone who runs the account.
9. Set up UTM tracking, a link tool, and Google Analytics 4 so clicks and conversions trace back to specific platforms and posts.
10. Calculate ROI monthly and present a one-page dashboard with the objective metric, reach, clicks, conversions, revenue, and ROI.











