

YOUR *social
media* **AUDIT**
(super simple)

Start your 2021 social media plan today.

first...

WHY?
WHO?
WHAT?
WHERE?
WHEN?
AND HOW?

Hey!

Firstly, I want to say thanks for downloading my audit "how to" PDF. I'm stoked that you're ready to audit what you're already doing and create a plan for 2021!

Next...ly?

I'm just going to jump right in!

WHY AUDIT?

The point of conducting an audit is to take a pause from what you're currently doing by stepping back and looking at your social media presence the way your audience sees it.

WHO IS THE AUDIT FOR?

Well, primarily the audit is for you and your employees. Your company benefits from staying well informed and being up to date on competitor content. But ultimately, the audit will provide your audience with fresh and interesting content based on... and this is the important part... what THEY want.

WHAT IS A SOCIAL MEDIA AUDIT EXACTLY?

This audit will provide you with numerical data that perhaps you didn't even know you could find. It will give you one single *weapon* document with the key

information that will help you plan your social media strategy going into 2021.

WHERE IS THE INFORMATION COMING FROM?

So, before you start, you should know what social platforms you are currently using. I am primarily on Instagram so this worksheet will be tailored to Instagram, but you shouldn't have trouble using it for Facebook, Twitter, or LinkedIn.

WHEN SHOULD YOU CONDUCT A SOCIAL MEDIA AUDIT?

You should conduct a social media audit in three main scenarios:

1. Before opening a new social media account
2. At the end of the fiscal year (or quarterly, if you want to be extra diligent)
3. When planning for growth

AND AS FOR "HOW?"

That's what I'm about to explain in using this worksheet!

If you find this helps, please share and give feedback! Love to hear from you... always!

Preparation

KPI

KEY PERFORMANCE INDICATOR

a measurable value that shows you how effectively you are achieving specific goals you have outlined for your business

engagement likes, comments, shares
impressions how many times your piece of content is seen
reach how many people have seen your piece of content
audience growth rate percentage of new followers in any given time period
engagement rate percentage of followers who engage with your piece of content
click-through rate (CTR) percentage of how many people clicked on your call-to-action
conversion rate percentage of visitors that took the action asked (download, purchase, subscription, etc.)

Audience Growth Rate

$\text{new followers} / \text{total followers} \times 100 = \text{audience growth percentage}$

Engagement Rate

$\text{likes} + \text{comments} + \text{shares} / \text{total followers} \times 100 = \text{engagement rate percentage}$

Click through Rate

$\text{clicks} / \text{impressions} \times 100 = \text{click-through percentage}$

Conversion Rate

$\text{conversions} / \text{clicks} \times 100 = \text{conversion rate percentage}$

“MARKETING WITHOUT DATA IS LIKE DRIVING WITH YOUR EYES CLOSED.”

- Dan Zarrella, Viral Marketing Scientist, Hubspot

START WITH THE END IN MIND.

YOUR ACCOUNT

quick example

handle: @cuckoo.brandpartners

follower count: 36

bio: business name, business type, a slogan that stands out, brief description, link to webpage or store

handle: _____

followers/likes: _____

bio: _____

WHAT DO YOU WANT YOUR SOCIAL TO DO FOR YOU IN 2021?

Okay guys, now it's time to set some goals. Each piece of content should have you working toward something specific. If you get stuck, I've provided some examples. But remember, every business is different and you'll want your goals to set you apart you from your competitors.

EXAMPLES:

BUILD BRAND AWARENESS GROW INTERNATIONAL BRAND INCREASE LEADS
CREATE CONTENT INCREASE CTR GROW REACH GROW REVENUE
DEFINE BRAND IDENTITY INCREASE CONVERSION RATE INCREASE WEB TRAFFIC
DIFFERENTIATE BRAND FROM COMPETITORS INCREASE FOLLOWERS

THREE 2021 SOCIAL MEDIA INITIATIVES

1.

2.

3.

Step one

SELECT THREE KEY PERFORMANCE INDICATORS THAT YOU WILL USE TO MEASURE YOUR GOALS

1

GOAL:

KPI:

2

GOAL:

KPI:

3

GOAL:

KPI:

You've already outlined your three main social media goals of 2021!

GREAT!

Now you're going to decide how you want to measure those goals using the KPIs I defined on page 3. You can always use your own performance indicator if you think of something that might help you be more efficient.

These KPIs will be the nuts and bolts of your audit. They should be quantifiable and social media relevant.

quick example

goal:

increase brand awareness

KPI:

1. impressions

Take it one step further!

Be a *superstar* and include a GOAL NUMBER and a DEADLINE to work toward.

Step two

GATHER DATA ON YOUR ACCOUNT.

TIME FRAME: _____ TO _____ (weekly, monthly, annually)

TOTAL NUMBER OF POSTS:

ACCOUNTS REACHED:

IMPRESSIONS:

PROFILE VISITS:

WEBSITE TAPS:

THREE MOST ENGAGING POSTS

(refer to page 2 for how to organize posts by interaction)

1 POST DESCRIPTION:

2 POST DESCRIPTION:

3 POST DESCRIPTION:

REACH:

REACH:

REACH:

LIKES:

LIKES:

LIKES:

COMMENTS:

COMMENTS:

COMMENTS:

SHARES:

SHARES:

SHARES:

this post's performance aligns with my goals

this post's performance aligns with my goals

this post's performance aligns with my goals

Step three

RESEARCH COMPETITORS.

Okay friends,

In step three you'll be compiling some data on your main competitors. Of course you will not have the same metric data as with your own personal accounts... but monitoring your competitor's accounts will give you a ton of insight about what your competitors may be doing well, not well, or not doing at all.

(Print this page multiple times to record other competitors' data)

COMPETITOR: _____	
handle: _____	how often do they post? _____
followers/likes: _____	_____
bio highlights: _____	how often do they post in stories? _____
_____	_____
_____	describe tone of voice: _____
_____	_____
_____	_____
_____	_____

ONE MONTH CONTENT ANALYSIS

Sort all of this competitors posts made in the last 30 days and organize into the following categories; video, quotes, photos, promotional content, etc.

VIDEO ___/30 X 100 = ___%

QUOTES ___/30 X 100 = ___%

PHOTO ___/30 X 100 = ___%

PROMOTIONAL ___/30 X 100 = ___%

OTHER ___/30 X 100 = ___%	SPECIFY:
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Step four

APPLY THE DATA AND SET
YOURSELF UP FOR SUCCESS!

INTERNAL

Use this box to list things you are doing well and want to keep up. What are you proud of?

Use this box to list things you would like to improve or impliment. Areas that you have recognized as weakness.

“RESEARCH IS CREATING NEW KNOWLEDGE.”

- Neil Armstrong

EXTERNAL

Use this box to list the areas of opportunity. What is lacking in the market that you might be able to offer?

Use this box to list the things you want to stay away from. What things haven't worked well for competitors in the past?