



Social Media Checklist™

A practical checklist for building a consistent, useful and manageable social media presence.

BRAND / PROJECT: _____

MONTH: _____

OWNER: _____

PRIMARY PLATFORM: _____

1 | Strategy & Goals

- ☐ Choose one primary goal: awareness, trust, community, leads, sales or support.
- ☐ Define the audience you want to reach and the problems they care about.
- ☐ Select only the platforms that match the audience and available capacity.
- ☐ Set two or three measurable outcomes for the month.
- ☐ Decide how social activity will support the wider business or project.

2 | Profile Setup

- ☐ Use a recognisable profile image and consistent account name.
- ☐ Write a clear biography explaining who you help and how.
- ☐ Add the correct website or campaign link.
- ☐ Check contact buttons, location, opening hours and category details.
- ☐ Pin or feature a useful introduction, offer or next step.
- ☐ Enable strong passwords, multi-factor authentication and recovery access.

3 | Content Foundations

- ☐ Choose three to five repeatable content themes.
- ☐ Define a consistent voice: helpful, credible and appropriate to the audience.
- ☐ Create simple visual guidelines for colours, type, images and video.
- ☐ List frequently asked questions that can become useful posts.
- ☐ Create a bank of customer stories, proof points, tips and behind-the-scenes ideas.
- ☐ Confirm who approves content and how quickly approval should happen.

4 | Monthly Content Plan

- ☐ Review relevant launches, events, seasons and customer priorities.
- ☐ Choose a realistic posting rhythm for each platform.

THE FUTURE™

- ☐ Balance educational, trust-building, community and promotional content.
- ☐ Assign a purpose and call to action to each planned post.
- ☐ Schedule creation, approval and publishing deadlines.
- ☐ Leave space for timely or responsive content.

5 | Create Each Post

- ☐ Lead with one clear idea or useful message.
- ☐ Write for the platform and keep the opening easy to understand.
- ☐ Use an image, graphic or video that supports the message.
- ☐ Add a relevant next step without forcing a call to action into every post.
- ☐ Check names, claims, dates, prices, links and tagged accounts.
- ☐ Use only content you own, have licensed or have permission to share.

6 | Accessibility & Inclusion

- ☐ Add alternative text to meaningful images.
- ☐ Caption videos and review automatic captions for errors.
- ☐ Use readable contrast, type size and uncluttered layouts.
- ☐ Write hashtags in CamelCase when they contain multiple words.
- ☐ Avoid relying only on colour, sound or visual cues to communicate meaning.
- ☐ Check language, examples and imagery for unintended exclusion.

7 | Before Publishing

- ☐ Proofread the final version in the publishing preview.
- ☐ Confirm the correct account and platform are selected.
- ☐ Test links, tags, locations, product references and campaign tracking.
- ☐ Check image crops, video covers and subtitles on mobile.
- ☐ Review timing against current events and scheduled announcements.
- ☐ Obtain required approval before scheduling or posting.

8 | Daily Engagement

- ☐ Check comments, messages, mentions and important notifications.
- ☐ Respond in a helpful, human voice within the agreed timeframe.
- ☐ Acknowledge useful contributions and answer genuine questions.
- ☐ Join relevant conversations without turning every reply into a sales pitch.
- ☐ Move personal, sensitive or complex issues into an appropriate private channel.
- ☐ Record repeated questions or feedback as future content ideas.

9 | Community Care

- ☐ Publish clear community guidelines where needed.
- ☐ Hide, report or remove spam, scams and harmful content consistently.
- ☐ Escalate complaints, safeguarding concerns or threats using the response plan.
- ☐ Never argue from the brand account or share private customer information.
- ☐ Keep a record of serious incidents and actions taken.
- ☐ Protect staff wellbeing by setting coverage hours and escalation boundaries.

10 | Weekly Review

- ☐ Check reach, engagement, clicks, enquiries and conversions against the goal.
- ☐ Identify the posts that generated meaningful action, not only reactions.
- ☐ Review audience questions, sentiment and common themes.
- ☐ Respond to any messages or comments still awaiting action.
- ☐ Reuse or adapt strong evergreen content where appropriate.
- ☐ Adjust the next week based on evidence.

11 | Monthly Review

- ☐ Compare results with the month's original goals.
- ☐ Identify which themes, formats, platforms and timings performed best.
- ☐ Review referral traffic, leads or sales created by social activity.
- ☐ Note the content that took too much time for too little value.
- ☐ Update the idea bank with customer language and new questions.
- ☐ Choose one improvement to test next month.

12 | Account Maintenance

- ☐ Review account access and remove people who no longer need it.
- ☐ Update biography, links, pinned posts and contact details.
- ☐ Check platform policy changes and privacy settings.
- ☐ Back up valuable original content and campaign assets.
- ☐ Review connected apps and revoke unnecessary permissions.
- ☐ Confirm the crisis, complaint and impersonation response contacts are current.

13 | Builder Tip

CONSISTENCY BUILDS TRUST — USEFULNESS EARNS ATTENTION.

You do not need to post everywhere or all the time. Choose a sustainable rhythm, help the right people, and let evidence shape what you create next.

The future isn't something you wait for. It's something you build.