[Company name]

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue [field] until no blue remains. Add or remove table rows to fit your needs. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

Social Media Plan

This plan sets the rules for [Business or brand name] on social media for [Plan period covered]: what the activity must achieve, who it is for, which channels carry it, what themes it covers, how often it appears, who owns it, and how it will be judged. The dated publishing calendar sits separately; this plan governs it, and does not replace it.

1. Plan summary

Business or brand name: [Business or brand name]

Plan period covered: [Plan period covered by this social media plan]

Plan owner: [Full name and job title of the plan owner]

Business objective supported: [Business objective this social media activity supports]

Plan status: [Plan status: draft, in review, or approved]

2. Goals and measures

Goal	Measure	Target	Review date
[Social media goal 1]	[Measure for social media goal 1]	[Target for social media goal 1]	[Review date for social media goal 1]
[Social media goal 2]	[Measure for social media goal 2]	[Target for social media goal 2]	[Review date for social media goal 2]
[Social media goal 3]	[Measure for social media goal 3]	[Target for social media goal 3]	[Review date for social media goal 3]

3. Audience

Primary audience: [Description of the primary social media audience]

Secondary audience: [Description of the secondary social media audience]

Audience needs: [Needs and interests of the social media audience]

Where the audience spends time online: [Where the target audience spends time online, by channel type]

What the audience responds to: [Content the audience responds to most strongly]

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4. Channel plan

Include only channels the team can sustain at the stated cadence. A channel with no owner and no cadence is not a plan; it is a wish, and it should be removed until resources exist.

Channel or platform type	Role of this channel	Formats used	Posts per week	Owner
[Channel or platform type 1]	[Role of channel 1]	[Formats used on channel 1]	[Posts per week on channel 1]	[Full name of the owner of channel 1]
[Channel or platform type 2]	[Role of channel 2]	[Formats used on channel 2]	[Posts per week on channel 2]	[Full name of the owner of channel 2]
[Channel or platform type 3]	[Role of channel 3]	[Formats used on channel 3]	[Posts per week on channel 3]	[Full name of the owner of channel 3]

Channels deliberately not used: [Channels deliberately not used, with the reason for each]

5. Content pillars

Content pillar	Audience need it serves	Formats	Share of posts	Call to action
[Content pillar 1]	[Audience need served by content pillar 1]	[Formats for content pillar 1]	[Share of posts for content pillar 1]	[Call to action for content pillar 1]
[Content pillar 2]	[Audience need served by content pillar 2]	[Formats for content pillar 2]	[Share of posts for content pillar 2]	[Call to action for content pillar 2]
[Content pillar 3]	[Audience need served by content pillar 3]	[Formats for content pillar 3]	[Share of posts for content pillar 3]	[Call to action for content pillar 3]
[Content pillar 4]	[Audience need served by content pillar 4]	[Formats for content pillar 4]	[Share of posts for content pillar 4]	[Call to action for content pillar 4]

6. Voice and tone

Voice in three words: [Three words describing the social media voice]

Tone for everyday posts: [Tone to use for everyday social media posts]

Tone for complaints or sensitive replies: [Tone to use for complaints or sensitive replies]

Words and phrases to use: [Words and phrases to use on social media]

Words and phrases to avoid: [Words and phrases to avoid on social media]

Hashtag approach: [Hashtag approach: how hashtags are chosen and how many are used]

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7. Community management

Who replies to comments and messages: [Full name and job title of the person who replies to comments and messages]

Target response time: [Target response time for comments and messages]

What gets escalated: [Types of comments or messages that must be escalated, and to whom]

How complaints are handled: [Process for handling complaints received on social media]

How negative or abusive comments are handled: [Process for handling negative or abusive comments]

Approval needed before replying: [Replies that need approval before posting, and who approves them]

8. Workflow and resources

Who plans content: [Full name and job title of the person who plans content]

Who creates content: [Full name and job title of the person who creates content]

Who approves content: [Full name and job title of the person who approves content]

Who publishes content: [Full name and job title of the person who publishes content]

Planning cycle: [Planning cycle: how far ahead content is planned and when it is reviewed]

Tools used: [Tools used for planning, scheduling, and reporting on social media]

Monthly content production budget: [Monthly budget for social media content production]

Monthly paid promotion budget: [Monthly budget for paid social media promotion]

9. Measurement, review, and decisions

Metrics reported each month: [Metrics reported each month for social media]

Where the numbers come from: [Sources used for social media reporting]

Monthly review meeting: [Day and time of the monthly social media review meeting]

Decision rule if a goal is missed: [Action to take if a social media goal is missed]

Decision rule if a channel underperforms: [Action to take if a channel underperforms for two consecutive review periods]

Quarterly plan review date: [Date of the quarterly social media plan review]

Sign-off

Prepared by: [Full name and job title of the person who prepared this document]

[Company name]

Date prepared: [Date this document was prepared]

Approved by: [Full name and job title of the person who approved this document]

Date approved: [Date this document was approved]