

THE

SOCIAL MEDIA AUDIT WORKBOOK

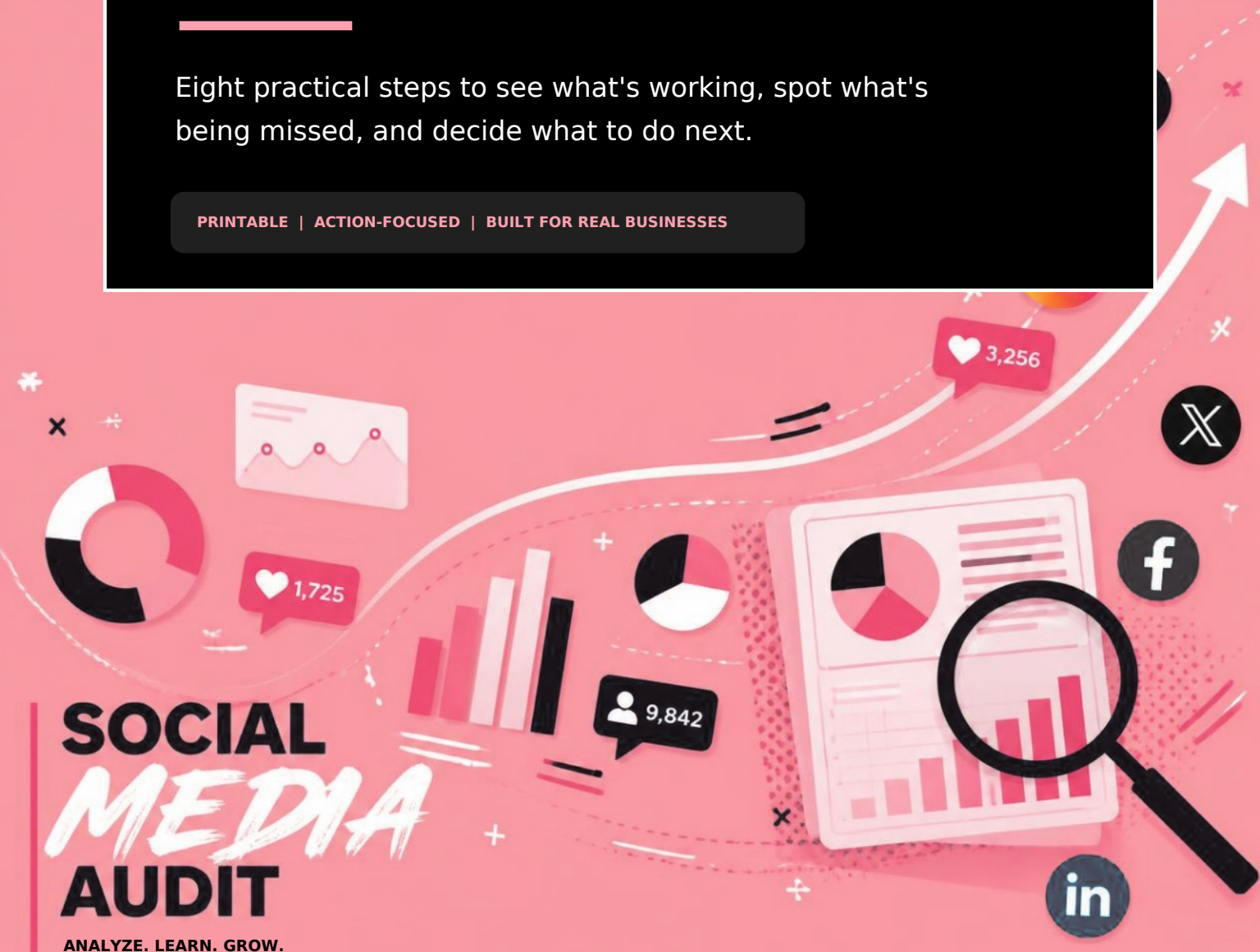


Eight practical steps to see what's working, spot what's being missed, and decide what to do next.

PRINTABLE | ACTION-FOCUSED | BUILT FOR REAL BUSINESSES

SOCIAL MEDIA AUDIT

ANALYZE. LEARN. GROW.



START WITH THE EVIDENCE

Find the patterns first. Make decisions second.

HOW TO USE THIS GUIDE

- ☐ Audit one platform at a time.
- ☐ Review the same 90-day period.
- ☐ Score before you start editing.
- ☐ Turn the lowest scores into priorities.

PULL THIS FIRST

- ☐ Your primary business goal
- ☐ The last 90 days of insights
- ☐ Your current profile and links
- ☐ Three relevant competitors or peers

YOUR QUICK SCORECARD

0 = missing 1 = needs work 2 = strong

PROFILE & BRAND

☐ 0 ☐ 1 ☐ 2

COMPETITIVE SCAN

☐ 0 ☐ 1 ☐ 2

CONTENT

☐ 0 ☐ 1 ☐ 2

PLATFORM FIT

☐ 0 ☐ 1 ☐ 2

AUDIENCE & COMMUNITY

☐ 0 ☐ 1 ☐ 2

OPPORTUNITIES

☐ 0 ☐ 1 ☐ 2

PERFORMANCE METRICS

☐ 0 ☐ 1 ☐ 2

ACTION PLAN

☐ 0 ☐ 1 ☐ 2

TOTAL SCORE / 16

Use the score to prioritize, not to judge the work.

STEP 01

Profile & Brand Foundation

- ☐ Make sure your logo or profile photo is recognizable at a small size.
- ☐ Say who you help, what you do, and why it matters in your bio or headline.
- ☐ Confirm your handle, business name, contact details, and website link are current.
- ☐ Keep colors, visuals, language, and tone consistent across the profile.
- ☐ Use pinned or featured content to support your current priority.

ASK YOURSELF Would the right person know they are in the right place within five seconds?

SCORE THIS SECTION

☐ 0 MISSING

☐ 1 NEEDS WORK

☐ 2 STRONG

STEP 02

Content Review

- ☐ Review the last 90 days, not only the posts you remember.
- ☐ Identify your top five and bottom five posts based on your actual goal.
- ☐ Check whether each hook, visual, caption, and call to action is easy to follow.
- ☐ Note which topics and formats earn saves, shares, clicks, replies, or qualified DMs.
- ☐ Build repeatable content themes instead of posting simply to stay visible.

ASK YOURSELF What deserves more room in your strategy, and what needs to be retired?

SCORE THIS SECTION

☐ 0 MISSING

☐ 1 NEEDS WORK

☐ 2 STRONG

STEP 03

Audience & Community

- ☐ Review current follower demographics and active audience data where available.
- ☐ Compare who engages now with the people your business wants to reach.
- ☐ Read comments and DMs for recurring questions, objections, and language.
- ☐ Check response time, unanswered conversations, and missed follow-up opportunities.
- ☐ Identify customers, advocates, partners, and community voices worth nurturing.

ASK YOURSELF Are you collecting attention, building trust, or doing both?

SCORE THIS SECTION

☐ 0 MISSING

☐ 1 NEEDS WORK

☐ 2 STRONG

STEP 04

Performance Metrics

- ☐ Choose metrics that match the job each post was meant to do.
- ☐ For awareness, review reach, impressions, views, and watch time.
- ☐ For engagement, review shares, saves, meaningful comments, and engagement rate.
- ☐ For action, review link clicks, DMs, leads, conversions, and qualified inquiries.
- ☐ Compare results over time and by topic or format, not only post by post.

ASK YOURSELF Are you measuring what matters to the business or what is easiest to count?

SCORE THIS SECTION

☐ 0 MISSING

☐ 1 NEEDS WORK

☐ 2 STRONG

STEP 05

Competitor & Market Scan

- ☐ Review three to five competitors, peers, or category leaders.
- ☐ Compare positioning, offers, content themes, proof, and posting patterns.
- ☐ Notice what earns a visible response without copying someone else's approach.
- ☐ Look for unanswered questions, overlooked audiences, and gaps in customer proof.
- ☐ Write down one meaningful differentiator your business can own consistently.

ASK YOURSELF Where can your brand be more distinct, more useful, or more human?

SCORE THIS SECTION

☐ 0 MISSING

☐ 1 NEEDS WORK

☐ 2 STRONG

STEP 06

Platform Fit

- ☐ Evaluate each platform against your goal, audience, and available capacity.
- ☐ Compare the effort required with the quality of results it produces.
- ☐ Check whether the platform's strongest formats fit how your brand communicates.
- ☐ Review useful features you may be overlooking: newsletters, Stories, Lives, groups, or collaborations.
- ☐ Give every platform a decision: grow, maintain, test, or pause.

ASK YOURSELF Presence is not a strategy. What specific job does this platform serve?

SCORE THIS SECTION

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☐ 2 STRONG

STEP 07

Opportunities to Improve

- ☐ Repair broken links, outdated details, and weak pinned content first.
- ☐ Turn proven topics into a series instead of chasing a brand-new idea every time.
- ☐ Repurpose strong content with a purpose, not as an automatic copy-and-paste.
- ☐ Improve accessibility with captions, alt text, contrast, and readable type.
- ☐ Test one variable at a time so you can tell what actually changed the result.

ASK YOURSELF Which improvement would make the biggest difference with the least friction?

SCORE THIS SECTION

☐ 0 MISSING

☐ 1 NEEDS WORK

☐ 2 STRONG

STEP 08

Goals & Next Steps

- ☐ Set one 30-day goal tied to a meaningful business outcome.
- ☐ Choose the three priorities most likely to move that goal forward.
- ☐ Assign an owner, due date, and success marker to every action.
- ☐ Schedule a short weekly check-in and a deeper monthly review.
- ☐ Decide what you will stop doing to create room for the work that matters.

ASK YOURSELF What decisions will turn this audit into action instead of a longer to-do list?

SCORE THIS SECTION

☐ 0 MISSING

☐ 1 NEEDS WORK

☐ 2 STRONG

TURN THE AUDIT INTO ACTION

Pick three moves that can make the biggest difference over the next 30 days.

PRIMARY 30-DAY GOAL

PLATFORM FOCUS

KEY METRIC

1

PRIORITY + ACTION

SUCCESS LOOKS LIKE

DUE

2

PRIORITY + ACTION

SUCCESS LOOKS LIKE

DUE

3

PRIORITY + ACTION

SUCCESS LOOKS LIKE

DUE

CONTINUE

One thing already earning its place

TEST

One focused experiment

STOP

One task that no longer serves the goal



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