

Social Media Management Checklist 2026

9 ready-to-use checklists covering every phase of your social media operation — strategy, audit, content, scheduling, engagement, analytics, team SOPs & AI automation.

✓ Free Resource ✓ 9 Checklists ✓ For Marketers, Managers & Agencies

How to use this checklist: Run Step 1-3 once to build your foundation. Then operate each remaining step on its own recurring schedule — daily, weekly, monthly, or quarterly. Tick off every box, assign owners, and revisit quarterly to keep the system fresh.

STEP 1

ONE-TIME SETUP |

Social Media Strategy Foundation

Review Quarterly

- Define SMART goals for each platform (Specific, Measurable, Achievable, Relevant, Time-bound)
- Document target audience: demographics, psychographics, and platform behaviour
- Select platforms based on where your audience is active — not personal preference
- Set KPIs for each goal: engagement rate, reach, CTR, conversions, response time
- Write brand voice guidelines: tone, vocabulary, do's and don'ts
- Assign platform owners across the team with documented responsibilities
- Align social strategy with the broader marketing and business calendar
- Schedule a quarterly strategy review to refresh goals and KPIs
- Document your unique value proposition and how it translates to social content
- Confirm competitor landscape: identify 3-5 direct competitors to benchmark against

Tip: 73% of businesses using social media for brand awareness cite lack of strategy as their #1 barrier (HubSpot).

STEP 2

ONE-TIME SETUP |

Social Media Audit Checklist

Repeat Quarterly

- List every active and inactive social media profile in a master document
- Check branding consistency across all profiles: logo, bio, cover image, username
- Verify all profile links point to correct, working landing pages
- Review last 90 days of content — identify top 3 and bottom 3 performers
- Analyse engagement trends: which content formats outperform others?
- Review audience demographics: age, location, and peak activity times
- Track follower growth rate vs. the previous quarter
- Audit top 3 competitors: posting frequency, content formats, engagement rates
- Identify content gaps: topics your audience wants that you're not covering
- Flag all dormant profiles (no posts in 60+ days) and decide: commit or redirect

Tip: Dormant profiles actively harm your brand — a silent page signals to prospects that your business isn't engaged.

STEP 3

ONE-TIME SETUP |

Content Planning System Checklist

Refresh Monthly

- Define 3-5 content pillars aligned with audience interests and business goals
- Apply the 70/20/10 content mix: 70% value, 20% engagement, 10% promotional
- Build a monthly content calendar with weekly themes and campaign tie-ins
- Map content to upcoming product launches, campaigns, and industry events
- Document repurposing workflow: which content types get adapted and how
- Assign content types per platform — no copy-pasting identical posts across channels
- Schedule a weekly 30-60 min ideation session with the content team
- Create a content bank / idea backlog for low-inspiration days
- Plan for seasonal and trending content opportunities 2-4 weeks in advance
- Confirm editorial calendar is shared and accessible to all team members

Tip: A well-repurposed piece of content can generate 5-8 posts from a single idea across platforms.

STEP 4

Pre-Production Content Checklist

Before EVERY Post

- Content aligns with the current campaign goal and an assigned content pillar
- Caption hook written in the very first line — no filler openers
- Clear message delivered in the caption body with logical flow
- Specific call-to-action included at the end (comment, click, share, save)
- Visuals sized correctly for each platform (Instagram 1080x1080px, LinkedIn 1200x1200px, etc.)
- Brand colours, fonts, and logo usage consistent with brand guidelines
- Text on visuals is readable at mobile size (minimum 24px)
- Hashtags researched: mix of niche-specific, mid-range, and broad tags
- All URLs tested and UTM parameters added for tracking
- Internal self-review completed before sending for stakeholder approval
- Manager or stakeholder approval obtained before content is scheduled
- Accessibility check: alt text added for images, captions on videos

STEP 5

Posting & Scheduling Checklist

Weekly

- Platform-specific posting frequency defined and documented for each channel
- Content queue built at least 7 days in advance
- Posts scheduled at audience peak hours (check platform analytics for your niche)
- Weekly content calendar reviewed every Monday before the week begins
- Campaign burst content pre-scheduled 2-4 weeks ahead of launch date
- Scheduling tool configured for multi-platform management
- Auto-publishing enabled with approval workflows active and verified
- Timezone settings confirmed for each platform and target audience region
- Backup content prepared for days when scheduled content underperforms
- Confirm no duplicate posts or overlapping campaigns in the same week

Tip: Brands that post consistently at a lower frequency consistently outperform brands that post in bursts (Hootsuite Research).

STEP 6

Daily Engagement & Community Management

Daily

- Reply to all comments on posts within the 2-4 hour target response window
- Respond to all DMs — no message left unanswered within 1-2 hours
- Review and acknowledge brand mentions and tagged posts
- Monitor relevant hashtags and industry conversations for engagement opportunities
- Address all negative feedback: acknowledge, empathise, offer resolution
- Complete at least 10 genuine engagement actions on followers' or prospects' content
- Ensure at least one question or discussion-starter is included in today's posts
- Identify user-generated content (UGC) to reshare or feature this week
- Escalate any crisis, viral complaints, or sensitive issues to the right team member
- Log recurring questions or complaints for FAQ/SOP updates

Tip: 77% of consumers expect brands to respond to social messages within 24 hours; 13% expect a reply within one hour (Sprout Social).

STEP 7

Analytics & Performance Tracking Checklist

Weekly + Monthly

- WEEKLY: Pull reach, impressions, and engagement rate for all posts
- WEEKLY: Identify top 3 posts — note format, topic, hook, and CTA used
- WEEKLY: Identify bottom 3 posts — diagnose the specific reason for underperformance
- WEEKLY: Track follower growth vs. prior week on every active platform
- WEEKLY: Monitor click-through rate and link clicks from social to website
- MONTHLY: Compile a full performance report with trends and period-on-period comparisons
- MONTHLY: Compare results against the KPI targets set in your strategy
- MONTHLY: Extract 3 actionable insights to feed into next month's content plan
- MONTHLY: Track conversion rate — how much social traffic becomes leads or customers
- QUARTERLY: Review overall strategy and adjust goals, KPIs, and platform focus if needed

Tip: Engagement rate benchmark: 1-5% is the target range, though this varies significantly by platform and niche.

STEP 8

ONE-TIME SETUP |

Team Workflow, SOPs & Collaboration

Review Quarterly

- All team roles clearly defined with documented responsibilities (Creator, Designer, Manager, Analyst)
- SOP written for content creation: from brief to first draft with timelines

- SOP written for content approval: review chain documented with owner names
- SOP written for scheduling and publishing: who queues, who confirms, who monitors
- New team members receive brand guidelines, tool access, and workflow walkthrough on Day 1
- Shared content calendar accessible to all team members with role-based permissions
- Communication channel defined and documented: Slack, Notion, Asana, or email
- Escalation process defined for urgent issues: crisis, viral negative posts, account security
- Regular team retrospective scheduled (monthly or quarterly) to improve workflows
- All passwords and account access stored in a shared, secure password manager

Tip: If your social media operation depends on one person's memory, you don't have a system — you have a single point of failure.

STEP 9

ONE-TIME SETUP |

AI & Automation Checklist

Review Monthly

- AI caption and content ideation tools integrated into the content creation workflow
- ALL AI-generated content reviewed and edited by a human before approval — no exceptions
- Scheduling and auto-publishing fully automated via a social media management tool
- AI analytics tools used to surface top and bottom performers faster than manual review
- Brand mention and keyword alerts configured for automated monitoring
- Content repurposing pipeline uses AI to adapt formats across platforms
- Auto-responders used only for FAQs — complex or sensitive queries escalated to humans
- AI prompts documented and stored in a shared prompt library for team consistency
- Evaluate new AI tools quarterly to identify workflow improvements
- Confirm AI tool data policies align with your brand's privacy and compliance standards

Tip: 68% of marketers using AI for content creation say it significantly improves productivity — but 79% still require human review before publishing (Salesforce).

Quick Reference — Recurring Schedule

DAILY

WEEKLY

MONTHLY

QUARTERLY

- Reply to comments •
- Respond to DMs •
- Check mentions •
- Engage with followers •
- Monitor for crises

- Pull analytics report •
- Identify top/bottom posts
- Monday calendar review •
- Queue upcoming content •
- Content ideation session

- Compile perf. report •
- Compare vs. KPIs •
- Update content calendar
- Refresh content pillars
- Competitor analysis

- Full social media audit
- Strategy & goal review
- Profile & bio check •
- SOP review & updates •
- AI tool stack evaluation