



 **Constant Contact**

# **Social Media Worksheet Bundle**

Plan smarter with strategy, campaign planning, and impact tracking worksheets for small businesses and nonprofits

# Social Strategy

To help you plan out your social media strategy take some time to go through this worksheet and identify your industry, audience, content, goals, and tactics.

1. What is my industry?

6. How often will you post in a week?

2. What content mix am I going to use?

4-1-1

80/20

The rule of thirds

5-3-2 approach

7. How often will you check your audience's engagement?

3. Why are you using each social media channel?

8. In what manner will you respond to your audience?

LinkedIn:

Instagram:

Facebook:

Youtube:

TikTok:

Pinterest:

Threads:

Bluesky:

9. In what manner will you respond to others' content?

4. What is your overall aim for using social media?

10. Trending hashtags to watch:

5. What campaign goal are you trying to achieve?

## Engagement Includes:

- Likes
- Shares
- Comments
- Mentions

# Social Strategy (example)

To help you plan out your social media strategy take some time to go through this worksheet and identify your industry, audience, content, goals, and tactics.

1. What is my industry?

baking/food service

2. What content mix am I going to use?

- 4-1-1
- 80/20
- The rule of thirds
- 5-3-2 approach

3. Why are you using each social media channel?

LinkedIn: Press, connection to other businesses

Instagram: Main channel, show off product, attract followers

Facebook: Show off product, event management

Youtube: No presence

TikTok: No presence

Pinterest: No presence

Threads: No presence

Bluesky: No presence

4. What is your overall aim for using social media?

Attract customers, schedule and promote events, build brand recognition and credibility through helpful tips, etc.

5. What campaign goal are you trying to achieve?

Increase monthly follower count, increase revenue from pre-order sales, increase event attendance

6. How often will you post in a week?

3-4 per week on Instagram, 2 per week to Facebook, 1 a week on LinkedIn

7. How often will you check your audience's engagement?

Daily on Instagram, twice a week on Facebook, once a week on LinkedIn

8. In what manner will you respond to your audience?

Quickly, with a casual, friendly tone that is eager to answer questions and deals with concerns generously

9. In what manner will you respond to others' content?

In a supportful way! We love to engage with fellow local businesses and the community.

10. Trending hashtags to watch:

#bakeshop #bakeshopsmithfield #smithfieldeats #VAeats #smithfieldVA #localbakeries #nytcooking #bonappetit

## Engagement Includes:

- Likes
- Shares
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# Social Campaign Planning

Use this worksheet to help you develop a social media campaign. Enter your goal and outline the posts you'll create to achieve it.

## Campaign Goal:

	Post 1	Post 2	Post 3
Content Type			
Caption/Message			
Call to action			
Links			
Post Date			
Design Ideas			
Social Channels			
Hashtags/Keywords			

## Example:

**Campaign Goal:** Increase event signups

	Post 1	Post 2	Post 3
Content Type	Static design	Video reel	Image carousel
Caption/Message	Get ready to get your bake on! Our strudel class is coming up soon. Save your spot today.	This apple strudel can be yours, made with your own two hands when you sign up for our strudel class. Only a few spots left!	This is your last chance to sign up for Bakeshop's apple strudel making class. We hope to see you there!
Call to action	Sign up	Claim your space	Huzzah for strudel
Links	signup.bit.ly	signup.bit.ly	signup.bit.ly
Post Date	X/X/XXXX	X/X/XXXX	X/X/XXXX
Design Ideas	Static image of people in the Bakeshop culinary lab	Montage of strudel making, dough stretching, etc.	Image carousel of stills from previous video
Social Channels	Instagram, Facebook	Instagram, Facebook	Instagram
Hashtags/Keywords	#BakeshopStrudel	#BakeshopStrudel	#BakeshopStrudel

# Measure Social Impact

Use this worksheet to measure your monthly social media impact. Enter the goal(s) you had for the month, the platforms you used, and your success metrics to help you determine what worked and what could be improved for the future.

**Goal:**

	Month 1	Month 2	Month 3
Platform			
Impressions			
Reach			
Likes			
Comments			
Shares			
Click-through-rate (CTR)			

**What worked:**

**What could be improved:**

## Example:

**Goal:** Increase email subscribers by 3%

	Month 1	Month 2	Month 3
Platform	Instagram	Instagram	Instagram
Impressions	11k	11.3k	10k
Reach	14k	15.3k	13.3k
Likes	4,300	4,700	4,400
Comments	787	794	750
Shares	239	250	340
Click-through-rate (CTR)	1.2%	1.5%	1.3%

**What worked:** Shares increased over time

**What could be improved:** Click-through-rate decreased over time, consider testing different calls to action.

# You're one step closer to social media that works.

These worksheets are just the beginning. With thoughtful planning and consistent posting, you can truly transform how you connect with your audience. We'd love to see how you made these your own — once you have filled them out, save them and [share them with us on our community page](#) for feedback.