



Quarterly Social Media Planning Checklist



Start of Quarter

- Set SMART goals for each active platform
- Audit current social metrics (followers, engagement, conversions)
- Review top-performing and underperforming content from last quarter
- Identify key campaigns, launches, or promotions for the quarter
- Align your social calendar with overall marketing goals and product timelines
- Update or confirm your content pillars and messaging themes
- Assign clear ownership for content creation and scheduling
- Review or allocate social media budget and resources



Monthly Maintenance

- Schedule posts for the month using your content calendar
- Review KPI dashboard and platform analytics
- Respond to audience comments, DMs, and mentions
- Monitor competitor activity or trends in your niche
- Test at least one new content format or posting tactic
- Refresh creative assets if needed (e.g., templates, visuals, video intros)



End-of-Quarter Check-In

- Compare performance against your SMART goals
- List top-performing content and analyze what worked
- Review any audience demographic or behavior changes
- Identify content or tactics to stop, start, or scale
- Gather team feedback on process, bandwidth, and tool needs
- Document findings and update the strategy for the next quarter