

Social Media Guide

This social media organizer is designed to help you stay on track as you work toward your goals. Remember to be creative but realistic with this. We want this to help you stay organized, motivated and most importantly, consistent. Some parts of this guide may feel silly, but stick with it! You'll be glad you did.

If you're confused about any topic, we recommend going back to watch the video again.

Social Media Strategic Plan (Be Specific)

Goal of Social Media

Strategies (2)

Objectives (2)

Tactics (2)

Social Media Brand Voice

4 Personality Traits

Tone of Voice (2 adjectives)

Your Brand's Favorite Beverage (be specific)

Outfit Your Brand Would Wear

Top

Your Brand's Top 5 Songs

Bottom

Shoes

Accessories

Branding Guide

Acceptable Forms of the Logo (Typically Only 3)

3 Primary Brand Colors

2 Secondary Brand Colors (Optional)

Brand Fonts (Typically 1-2)

Communication Tool Box

Words/Phrases to Use
When Describing Your Firm

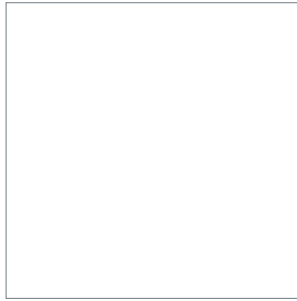
Words/Phrases to Use
When Explaining Your Services

Brand-Oriented Hashtags (4)

▶ (NEXT PAGE: FACEBOOK)

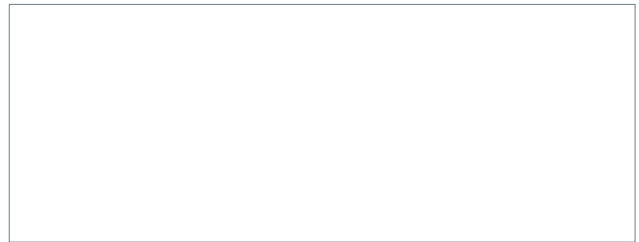
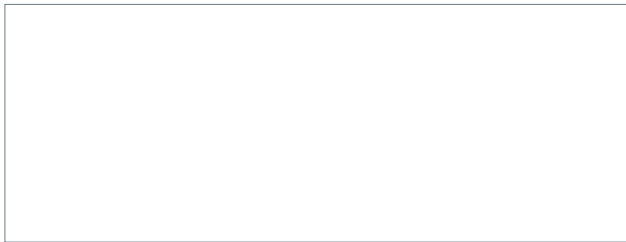
Facebook

Profile Photo – 2 Ideas



Bio – 2 Ideas

Cover Photo – 2 Ideas



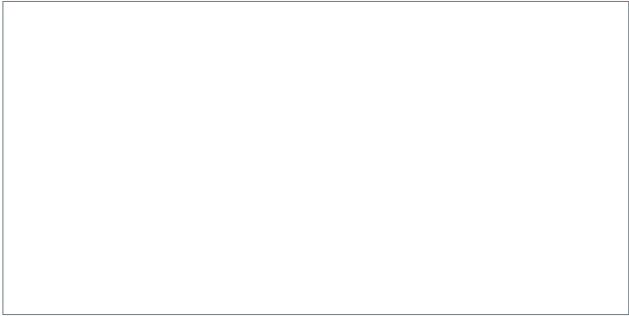
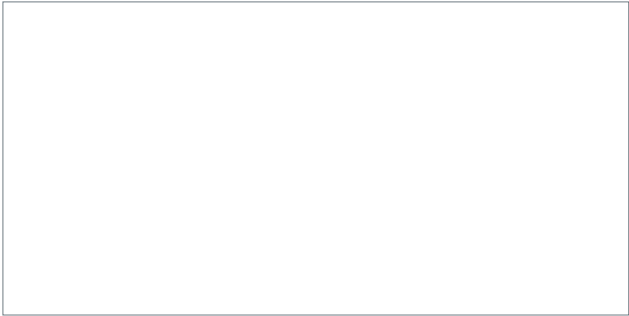
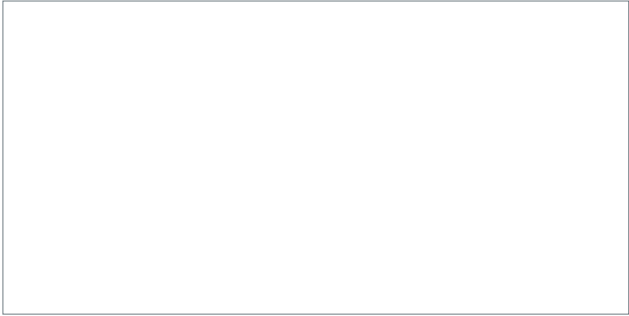
Admin

List of 4 Organizations You Can Share Posts From

▶ (NEXT PAGE: SOCIAL MEDIA PLAN)

Make sure your posts are approved by compliance.

There are online tools that can help with scheduling posts (mostly tailored for Facebook and Instagram): Hootsuite, Buffer, Planable, SproutSocial, and more. HeyOrca is one of our favorites for approval and archiving for compliance. Do your research to see which one is best for you.

Social Media Plan	
Photo	Caption
	Date to Post
Photo	Caption
	Date to Post
Photo	Caption
	Date to Post
Notes	

▶ (NEXT PAGE: TWITTER)

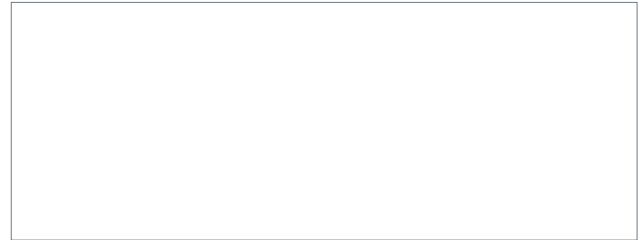
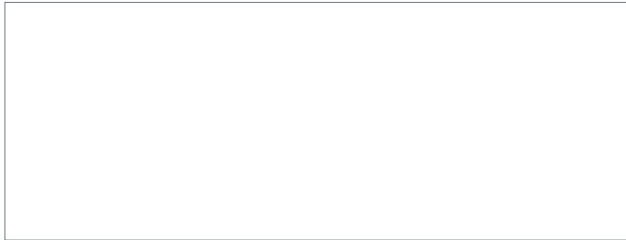
Twitter

Profile Photo – 2 Ideas



Bio – 2 Ideas

Cover Photo – 2 Ideas



Hashtags to Use

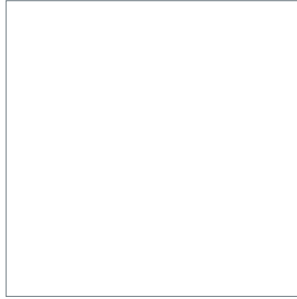
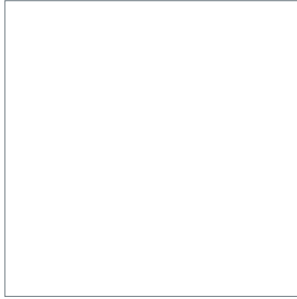
List of 4 Organizations You Can Share Posts From / Follow

Make sure your posts are approved by compliance.

▶ (NEXT PAGE: LINKEDIN)

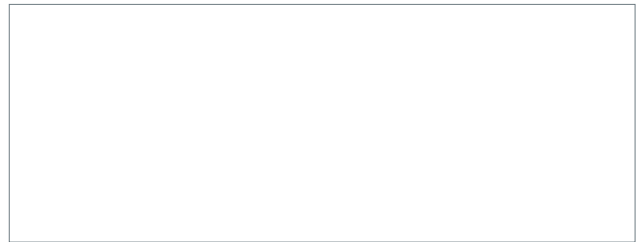
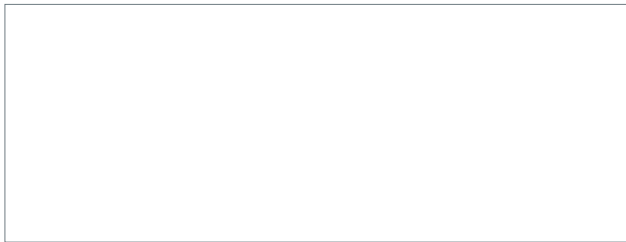
LinkedIn

Profile Photo – 2 Ideas



Bio – 2 Ideas

Cover Photo – 2 Ideas



Client #1 Circle of Influence

Client #2 Circle of Influence

Client #3 Circle of Influence

Client #4 Circle of Influence

Notes

Make sure your posts are approved by compliance.

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