

Checklist: 100 ways to make social media easier

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Introduction

Everyone wants to be a hit, and the place to do that is on social media.

But it's a ton of work, and it ain't easy. [Even brands that have been doing social for a while will admit that can be a tough gig](#). The thing is, most of these brands have paid teams of social media “experts.” Most small businesses, however, are doing social all on their own. And unless your social media is your business, chances are really good that you, too, find social to be pretty damn tough.

Unfortunately, there's no way to make it easy—but you can make it easier, if you work at it.

For those ready to put in the work, we put together a checklist of ways to approach your social media account to make sure you're spending your energy in the most effective way. Which means it will be easier. Not easy; just easier.

Look at what you're currently doing (or not doing)

Nothing is more frustrating than spinning your wheels

If you are reading an ebook about making social media easier, it would logically follow that you find it difficult right now. Therefore, it makes good sense to start this checklist with a look at what you're doing.

Many companies jump into social media and run with it. While some brands might have a natural knack for social, most don't. It can be easy to skip over the fundamentals in favor of making more flashy fixes. We'll get to those. But we want to be thorough. So let's walk through the basics.

Assess your current social channels

The first step to making social media easier is to be sure your channels are branded and up to date. Ideally, you'll be able to blast through and check all these off quickly, but if these things need to be addressed, don't let them slip through the cracks.

- First and foremost, ensure your company name is secured across multiple social platforms.** [Be sure to hedge your brand by having profiles on multiple social platforms](#), whether you plan to use them or not. This way, you won't have to worry about other entities hijacking your brand, or losing the opportunity to have a branded channel down the road.
- Is your bio/description updated and branded for each of your channels?**
- Does your profile image represent your brand?**
- Is your profile consistent on all your social channels?**
- Is your location information up to date?**
- Be sure all your contact information is updated.** Ensure your audience has a way to contact you. (i.e phone number, direct message, email, etc.)
- If you have business hours that matter to your audience, be sure those are up to date, too.**
- Have you been posting in line with your brand voice?** If your social posts don't seem to ring true to your brand, it will be worth noting. You'll want to nudge your future posts to line up with your strategy. ([see part 2](#))
- Be sure to upload an awesome cover image.** Think of your cover image as free ad space! It's a great opportunity to showcase more information about your brand, share a cool photo, or plug an upcoming promotion or event. [Be creative](#). Don't let this space go to waste.

- ❑ **Take a good hard look at your blog. Yes, your blog.** The content you produce on your blog is most often the center point for a business' social channel. The great ideas and information that comes from your blog should be shared on social. But in order to have blog posts that share well and gain traction on social, the substance has to be in the tone, voice, and subject matter that your audience will appreciate and care about. Tidy up your blog if need be.
- ❑ **Link to your social channels on your site.** Make sure you have [social buttons](#) on your site for visitors to be directed to your social channels. These are best placed at the top of a web page and are a quick and easy update to make if you haven't already made it.
- ❑ **Add social share buttons on your content.** [Social share buttons](#) make it easy for your readers to share your content with their followers and friends. You can even prepopulate the share content with your own text so all they have to do is click share, and they're done. For example, the Twitter share on a blog post for a great burger recipe can read, "[I'm sold on veggie burgers! #nomnom](#)". Go ahead, give it a try (you know you want to). ↑
- ❑ **Take advantage of SEO opportunities on social.** Insert keywords in areas like your LinkedIn profile headline, your Twitter bio, your Instagram name, or your Facebook about page to help your profile show up in searches. Just be cautious. You never want to make the content sound artificial by stuffing keywords into the copy.
- ❑ **Make your LinkedIn headline shine.** By default, the headline beneath your name shows your current job title. But you can change it to include a more robust description of your career or your special expertise. For example, "Social media marketing consultant for small businesses," says more than, "Owner at Collins Consulting." This is a quick win that can yield some great networking opportunities down the road.

- ❑ **Pin a post on Facebook, LinkedIn, Google+, and Twitter.** In case you didn't know, a pinned post is simply one of your posts that you've permanently locked to the top of your stream on your profile. The point of the pinning is to showcase something you want to guarantee that visitors will see when they view your profile. The pinned post can be about a current offer, upcoming event, or a video showcasing your brand. It's your opportunity to take more control of your social media profile. [Here's how-to pin posts.](#) (Bonus fact: Links in pinned Tweets outperform links in your Twitter bio.)

Identify which channels you should be on

Look. You don't have to be on all of them. But you should be on the right ones. While you've probably had success where you're at right now, there's a chance you could be rocking out on other social channels where your audience is even more receptive to what you have to offer.

- ❑ **Be sure you're active on the kinds of channels that click with your your business.** As a small business, you may not have time and resources to devote to a full-spectrum social media presence, but you should be active on the ones that naturally relate to the kind of things you're doing. Just like each small business is unique, every social platform serves a different audience and a different purpose. For more, [check out this article to help you think through what kind of social will work best for your small business.](#)
- ❑ **Where does your audience hang out?** Social media examiner has a wonderful article on [how to find out where your audience hangs out](#) to get you started.

In short, you should:

1. Identify your ideal audience.
2. Determine the size of your audience.
3. Survey your clients to see what channels they use.
4. Research online behavior by demographics, etc.
5. Connect with your current clients on those channels (hint, you can take your contact list and sync it up with social search to find your clients on most social channels).

- ❑ **Is your channel the best fit for the kind of content you share?**
The type of content and how your audience consumes them go hand in hand. Example: if you share great images, are you on image sharing social channels, like Instagram? Does your business involve tutorials? YouTube may be a great fit. If you're focused on sharing blog content or ebooks, Facebook could be a match. If you showcase products, try Pinterest. However you choose to use social, make sure you post content to channels according to each channel's primary purpose.

- ❑ **Is live video something your business can utilize?** Right now, live streaming video on social is the big thing. While live streaming may seem a bit frivolous at times (i.e., I'm live streaming at the grocery check out), it could also be a boon for businesses by providing new ways to connect with fans and grow your audience (i.e., I'm live streaming at the grocery check out to talk about my business: selecting healthy produce without breaking the bank). You can go live on Facebook, Twitter, Instagram, YouTube, and Snapchat, to name the big ones.

- ❑ **What are your competitors doing?** It's not worthwhile to copy what your competitors are doing, but it's great to see what works with a similar audience. When your competition is successful, it can give you hints as to what you could do. Facebook makes this exceptionally easy: You can [add competitor pages to the Pages to Watch section](#) of Facebook Insights to keep tabs on their follower numbers and the types of content they share.

Square away your strategy

Your social media efforts will be easier when you can point to why you're doing what you're doing. Not only will you be more motivated to produce (since you know it's truly going to contribute to the success of your business) but it will also help you focus on the stuff that matters and avoid the stuff that's not on strategy. Any time you can clearly align with the work that matters, and steer clear of the stuff that doesn't, you're going to be working smarter, not harder.

Being strategic simply means that you have a plan for making your time on social media meaningful and profitable for your business. It's about knowing which channels to use, how you'll measure your success, how often you'll post, and what kinds of content you'll include. Most importantly, you'll want to know who your audience is and why they'd want to interact with your brand.

- ❑ **Does your social media strategy align with your overall marketing strategy?**
- ❑ **Document your strategy and have it live somewhere that you can reference it and continually optimize.** While most companies will tell you that they have a strategy. Far fewer actually have written it out. The value of a written strategy is that it makes it easier to objectively track and measure your success. Not only that, but it also eliminates confusion when you have multiple people handling your social media channels.
- ❑ **Identify your purpose.** If you know exactly why you're doing what you're doing, the maintenance of your social channels will feel much less like a chore and much more like a natural extension of your business' mission. Are you trying to build brand awareness? Looking to convert leads to sales? Want to share awesome GIFs? Plan your content accordingly.
- ❑ **Pinpoint your brand voice, and be consistent.**
- ❑ **Be sure your interactions follow your strategy and keep you on course with your goals.**
- ❑ **Follow the platform's profile to get latest trends and updates.** (i.e. like FB to get FB updates). You can follow them all on one channel if you want, too. In other words, if you prefer to spend your time on Facebook, you can like Twitter, Google+, and Facebook there and get all the latest information for each of those platforms in one place.
- ❑ **Follow gurus like [Neil Patel](#), [Gary Vaynerchuk](#), and [Ann Handley](#).** They offer a steady stream of marketing advice and insight to help you up to date on the latest social media strategies and trends.

Set up goals and metrics for tracking your progress

Your strategy is only as good as your progress on it. And you can't know your progress if you don't evaluate your efforts with objective measurement. Most social platforms provide analytics so you can easily track your success. It doesn't have to be complicated.

- Take a look at the metrics available to you, and think through how they will help you measure your goal.

Basic measurements:

- **Traffic** shows how influential your content is. It's also a great metric for how well your social media presence serves to drive your audience to your website.
 - **Likes** demonstrate that your audience enjoys your content and is a great way to identify types of content that resonates with your audience so you can be more targeted with each new piece of content you create.
 - **Shares** demonstrate not only interest but also the useful value of your content. More shares means more people will see what you do, and if you can track what people share, you can create more of those kinds of posts to link to actionable content on your site.
 - **Followers** help you build authority on social. The more followers you can build, the wider your reach and the more likely your good stuff gets seen.
 - **Views** tell you a bit about how much of your known audience is seeing your posts. (If you want to boost your views, you can pay to promote posts; more on that in Part 6.)
 - **Mentions** are when other users refer to your brand. They can mention you via hashtag, reply, or by using your name or account handle (i.e. @KeapGroing). Mentions help you determine your share of voice and influence.
- **Set a baseline.** First start tracking, and don't tweak much. Wait about three months, or longer if need be. Then you can see what your basic interactions look like. From there, you can look at ways to boost your numbers.

- ❑ **Traffic** - track the numbers of people visiting your social channels and what kinds of content gets the most views.
- ❑ **Engagement** - how many likes and shares are you getting?
- ❑ **Followers** - it's key to track the base number of followers; are you growing or shrinking?
- ❑ **Influencers** - familiarize yourself with those following you. Reach out to influencers, and track your interactions with them. This could be a major boost to your content reach.
- ❑ Use [tracking links](#) to trace which posts are driving traffic to your pages.
- ❑ **Keep in mind when your audience is active.** What days of the week and times of day do you have the most success? Schedule your best content for those times.
- ❑ **Keep track of your share of voice.** On social, this refers to how many people are talking about your brand compared to how many are talking about your competition. To set this up, you'll need to track mentions of you and your competitors, then run this simple formula: (mentions of your brand) ÷ (total mentions of you and your competitors) = (your share of voice).
- ❑ **Watch sentiment.** Tracking sentiment can be a great metric for understanding how your efforts are being received by your audience, and it can help you carefully put out fires that will inevitably erupt on social. [Mention](#) is a great tool for tracking sentiment.

Consistency makes social simpler

Consistency is actually an easier way to manage your social media efforts. Here's why: you can use momentum to your advantage. It's a

little bit like the principle behind freight trains; it takes an enormous amount of energy to get moving and the buildup is slow, but once the train is up to speed, it's actually the most energy efficient way to transport goods over land. Social media follows this principle, too. The more consistently you invest in social media, the easier it will be to see success.

- ❑ **Social media is where you showcase your brand.** Don't be shy about posting.
- ❑ **Get into a routine of social interaction.** If you're not consistently on social, your social will suffer. You can't afford to be spotty.
- ❑ **Think through and schedule your posts in advance.** This way you can budget your time more effectively and still remain consistently present on your channels.
- ❑ **Be an active citizen.** Engage your audience through liking or retweeting/re-sharing their posts. This interaction is invaluable to showing your audience what matters to your brand.
- ❑ **Respond to comments in a timely way.** If someone took the time to comment, you should take the time to respond.
- ❑ **Some platforms (like Facebook's [Instant Replies](#)) have automated responses that can help you quickly respond with an automatic reply if you're unable to get to it yourself.** It's like an out of office reply for private messaging. This will help you consistently respond quickly to your audience, even when you're away from the platform.
- ❑ **Strive for a consistent voice.**
- ❑ **Even if your social channels provide unique streams of content for your brand, you should have a way of communicating that expresses the personality of your brand.**
- ❑ **Pace yourself.** Get your content on a calendar and also sprinkle impromptu content throughout. It always pays to be on your toes, even if you are scheduling your posts— think [Oreo's and the Super Bowl](#).

- ❑ **Repost audience content.** If users see that you repost audience content, they may be more inclined to share your brand's content. Plus, when you repost audience content, you add to the richness of your output, so it's always a win.

Must-have tools of the trade

Tools are there to make the job easier. There are a lot of tools out there, and we recommend that you do a little research to find ones that work the very best for strategy. However, the following tools are the bare minimum, allowing you to be more efficient at posting and tracking progress.

- ❑ **Scheduling tool:** We mentioned earlier that scheduling your posts is crucial to maintaining a consistent approach to social. Take the time to look closely at the array of available scheduling tools to find one that fits your budget and your needs. Hootsuite is a good, basic free platform, and Buffer is great. CoSchedule is a paid app, but it allows you to schedule out social as well as blog posts. This is the best way to ensure that you're consistently driving your social audience to the latest and greatest content on your website. Keep in mind that not all social platforms are supported by the likes of Hootsuite and Buffer. There are scheduling apps for specific platforms, i.e. Later for Instagram and Tailwind for Pinterest.
- ❑ **Engagement Measurement tool:** You'll need to track interactions. Make it easy on yourself with a tool like [Sprout Social](#), [Simply Measured](#), or [Oktopost](#).
- ❑ **Content Ideation tool:** Sometimes, you'll find yourself stuck racking your brain for ideas on what to post. Enter tools like [Feedly](#) and [GetPocket](#). These apps will help you follow current content from around the web by area of interest and easily discover shareable content. Use them to inspire your own take on an issue.

- ❑ **Brand monitoring tool:** It can be difficult to pull all the data on your portfolio of social interactions and compile meaningful reports to help you understand how you measure up against your goals. Tools like [Nuvi](#) and [Mention](#) help simplify the data so you can spend less time reporting and more time analyzing and improving.
- ❑ **Social analytics tool:** To produce the best stuff, you've got to see what's working. Social analytics tools, like [Buzzsumo](#), give you input on how content performs so you can aim for the right keywords, shape your headlines, and develop your own great shareable content.
- ❑ **Share of voice monitoring:** [Mention](#) is the powerhouse app for measuring your share of voice. On social, this refers to how many people are talking about your brand (aka "mentioning" you) as compared with your competitors. It's a powerful metric to understand as you look to grow your audience. You should track both your share of voice as well as your competitors'.
- ❑ **Design tool:** Apps like [Canva](#) and [Pablo](#) (owned by Buffer) allow you to use free or cheap graphics and pictures to create easy-to-read images and infographics that you can tailor for a variety of platforms (i.e. Facebook post, Facebook ad, Instagram post, Pinterest pin, Twitter post, etc.)

Get your posts right

The real meat and potatoes of social media is about what you post, when, and why. Keep in mind that for your small business, you're not on social just to post fun text quips or pictures that strike your fancy. You're there to build an ever-growing community that will help you spread the word about your brand and ultimately produce more sales.

In that context, you should think that what you're really doing is creating "social content." It's all an expression of your brand, your expertise, and your values. You can create beautiful ads. Or interesting infographics. Or helpful advice. Whatever works for you.

Have yourself a heyday, but do it right.

Create content that is platform specific

- ❑ **LinkedIn** is professional and most powerful for networking and influencer marketing.
- ❑ **Twitter** is about micro-conversations, where short, witty exchanges rule. Article and blog post sharing does well here, and it, too is excellent for influencer marketing.
- ❑ **Facebook** is a less formal space great for dialogue with your network and is a powerful space for sharing images, infographics, articles, and blog posts.
- ❑ **Pinterest** is for images and works best for showcasing your products and building a context for how they can fit in with other products or areas of interest.
- ❑ **Instagram** is an image-sharing platform that emphasizes stylish, well shot photos. It's great for showcasing products and even services that have a photogenic angle.
- ❑ **YouTube** is, of course, video only, but it's a great platform for sharing instructive and helpful videos. It's a powerful medium for demonstrating your product as well as showcasing your expertise.

Optimize everything

- ❑ **Make sure you're using the right [open graph image and title with descriptions](#).**
- ❑ **Apply strong [SEO principles to YouTube titles and descriptions](#).**
- ❑ **Social media profiles rank in search.** Target keywords and be sure to optimize all your profiles for the specific keyword that most relates to your social media strategy.

Manage your social media activity with care

- ❑ **Be sure your entire social strategy clearly has an owner.** Someone's got to be responsible, all the time.

- One of the most common social media misconceptions is that if it's not helping, it's at least not hurting.** False. If it doesn't help, it hurts. If you don't update for a while because you don't have anything to say, not only does it not help you—it hurts you.
- Be sure that anyone who interacts on behalf of your brand channels understands your brand voice and social media strategy.**
- Create a master calendar (see Scheduling in [Part 4](#)) to be sure you regularly post meaningful content on social that coincides with your overall marketing strategy.**
- Monitor sentiment.** Keep track of how your brand is perceived, and carefully work to repair negative sentiment.
- Have a strategy in place for responding to negativity.** What would your brand do? What are your options? It's never a good idea to get into a Twitter war or a Facebook fight.
- ABP: Always be professional.**
- Be conscious of brand mentions that get traction.** If people are buzzing about a particular area of your business, it's a great way to get inspiration for your next content.
- Amplify positive shout outs.** Every bit of activity is a piece of content that lives on your feed, so by retweeting, or otherwise sharing the shout outs and mentions of your brand, you not only spread the word on that mention, but you also add it to your feed for visitors to read.

Outsourcing: What to know

If you have the budget to outsource your social media activity, you'll want to consider the following before you bring contractors onboard:

- Review their social channels.** Do they look professional and contemporary?

- Their resumes are important.** What work have they done for others?
- Do your due diligence:** call their references. Do not skip this step.
- What's their style?** Do they produce content that will work for you?
- How innovative are they?**
- Do they keep up with trends and new tools?**
- Be cautious of guarantees like “x followers in a month;”** instead, find out strategy and how they grew their own social following. Remember, no one can actually guarantee any particular result in social.

How to stand out

- Be authentic.** With authenticity comes creativity. You're never going to appeal to everyone, but you'll resonate with your audience the most when you're being authentic. There will be people who enjoy your stuff, and they'll follow you, and there are others who won't. Don't try to please everyone.
- Let your brand personality shine through.** Your personality is revealed in the tone of your content, the style of your images, and your colors. Let it infiltrate every aspect of your social interactions. For example, don't just share a link or image, add a comment in your brand's unique way. Suddenly your personality is present in the content.
- Mix it up.** It can be super easy to fall into a rut, posting the same kind of content over and over again. Mix up the content you share. Try to hit the variety of content styles and forms that the platform allows. For facebook, you can use gifs, video, live video, still images, infographics, text only, and more. For Instagram you can use still photos and videos and live video. Try out the gamut, and then see what works the best with your audience.

- ❑ **Keep an eye on your competition.** Note where your competitors are successful, and see if there's an opportunity for you. Just be careful: comparison is a wormhole you don't want to fall into. Brands do what they do on social because it makes sense for their brand. Even so, they can also provide inspiration for you.
- ❑ **Be a source of industry news.** Share news articles that are of interest to your audience and which relate to your industry. Be the one that people want to follow in order to keep up on the trends.

Don't forget about messenger apps

Social media has evolved toward an increasingly individualized experience between brands and their followers, and direct messaging is key to being there. It behaves like a texting app, but it gives you a ton of extra power. Messenger gives you the ability to interact directly with your customers in a variety of ways.

Now here's the thing: It might sound like more interaction means more work, but that's not entirely the case. Check out these super awesome tips for making DM easier.

- ❑ **Use Chatbots.** Chatbots are amazing tools that allow you to simplify and automate your conversations. [Businesses are already using chatbots](#) to make communications faster, more efficient, and more personalized. Chatfuel, for example, can help you build a Facebook bot without having to know any code.
 - For [Facebook](#)
 - For [Slack](#)
 - For [Twitter DM](#)
- ❑ **Use the Shopify Plugin.** If you do e-commerce, Shopify is a fantastic tool, and it even integrates with Facebook [Messenger](#), which allows users to purchase directly in the chat app. This means you can suggest a solution based on their inquiry, and they can purchase directly from the direct messenger app.

Paid social can be easier. Seriously, it can be.

Businesses cannot live on organic alone. Maybe once upon a time you could argue that organic was enough, but no more. The social media algorithms have moved on. If you're going to use your social media for gain, you've got to do the paid thing. Unfortunately, paid social is a little trickier to do the right way, especially for small businesses who may not be able to invest in qualified staff to handle it for them. But it can be easier. Oh, yes. It can be easier.

- ❑ **Establish your paid social media strategy.** Paid social is generally a subset of your overall social media marketing strategy, and your objectives with paid social should support your organic social media efforts.
- ❑ **Understand the options and the costs.** Each platform offers different kinds of options for advertising and paid promotion. Take the time to [compare platforms and prices](#).
- ❑ **Set your budget.** Setting (and sticking to) a budget is the next obvious step, but is probably the hardest part of managing a paid social media strategy. Once you've looked closely at the costs in conjunction with your goals, let your budget be your friend. Once it's on the books, your budget is license to spend! It's also one of your very first indicators as to the success of your efforts.
- ❑ **Be sure to use tracking links for all your paid promotions.** Tracking links are the number one metric you can use to ensure you're getting ROI from your social promotions.
- ❑ **Be sure to target the right audience.** Spend time up front on this.
- ❑ **Keep your ads fresh.** Remember, social media isn't one-way communication. It centers on engagement and interaction. Repetition can be an effective way to advertise, but in an interactive environment like social, audiences quickly tire of repetition and tune it out. You can counter this by having a variety of ads you cycle through in order to keep up the variety.

Get sales: set up social to drive traffic to your site

Ultimately, social engagement is great and can lead to tons of opportunity, but when you're consciously trying to grow sales, you need to make sure you have an apparatus in place to make your social media a sales engine, too. This means you have to think of your social interactions in terms of your sales cycle. By driving traffic to your site, you take the momentum you build on social and turn it directly to nurturing leads and growing sales.

- ❑ **Take the time to investigate how social fits in with your sales cycle.** This may take some soul searching and thought, but the more you know about your own unique processes, the better off you'll be as you use social to boost sales.
- ❑ **Actually track activity and measure how it leads to sales.** A lot of businesses are so busy growing their social on one hand and following up with leads on the other hand, that they actually fail to track how their efforts are going. You may have to get creative to find a way to intuit how social influences your sales, but it will be worth it when you tighten up the process.
- ❑ **Follow up on your tracking links to see who's going to your pages from social.** Did it lead to a sale? Can you find ways to repeat a good thing?
- ❑ **Use a social selling strategy.** With social selling you monitor conversations via social keyword searches and hashtag searches to see who might be looking for a product or service like yours. This provides you an opportunity to offer them a resource of yours (like an ebook or helpful video), or send them directly to your site.
- ❑ **Use CTAs in your social posts.** This is the most direct way to use social to drive traffic to your site. When you post new content, invite them to go listen now! Or download here! Or find out more here! With a great call to action, you can move your audience toward a sale.

- ❑ **Drive traffic to targeted landing pages.** [Landing pages](#) do a ton of good. Because they are laser focused on a call to action, you can reasonably understand why the person is on the page and get them to take action.
- ❑ **Make sure your social media followers are also on your email subscriber list.** Then, combine what you know about them on social with targeted email campaigns.
- ❑ **Use marketing automation to follow up on interactions.** The best way to ensure that you don't miss out on opportunities or drop leads is to use marketing automation, like [Keap](#), to follow up.

Conclusion

Okay, so social media is never going to be easy. Not in the [Lionel Richie sense](#), but it can be easier.

The mantra to making social media easier boils down to this: momentum. When you set up your strategy, optimize your profile, and follow best practices with your posts, you'll hit a stride. Once you have that stride, social media will become easier. And more importantly, your social media will be more profitable.

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