



Social Media Strategy Checklist for Marketing Agencies



Introduction

A robust social media presence is essential for modern real estate professionals. This comprehensive checklist will help you develop, implement, and maintain an effective social media strategy that attracts potential clients, showcases properties, and establishes your authority in the real estate market. Use this checklist to ensure consistency, engagement, and growth across your social media platforms.

Strategic Planning

Client Discovery

- Conduct initial client interview
- Document client's business objectives
- Identify target audience demographics
- Map competitor landscape
- Review current social media presence
- Document brand voice and guidelines
- Establish client's unique selling propositions
- Define success metrics

Platform Strategy

- Identify optimal social media platforms for target audience
- Audit existing social media accounts
- Research platform-specific best practices
- Define posting frequency for each platform
- Create platform-specific content guidelines
- Plan cross-platform integration strategy
- Set up or optimize business accounts
- Verify all business profiles

Content Planning

Content Strategy

- Create content pillars
- Develop content themes
- Build content calendar template
- Plan content mix ratio (promotional/educational/entertaining)
- Define hashtag strategy
- Create branded hashtags
- Research trending topics in industry
- Plan user-generated content strategy

Visual Assets

- Create brand style guide for social media
- Design template library
- Set up photo/video guidelines
- Plan branded graphics requirements
- Create platform-specific image size templates
- Establish visual consistency guidelines
- Define video content strategy
- Plan story/reel content approach

Engagement & Community Management

Community Guidelines

- Create response templates for common scenarios
- Establish response time standards
- Define crisis management protocol
- Set up community management schedule
- Create escalation procedures
- Document banned words/topics
- Establish influencer outreach strategy
- Define community engagement tactics

Monitoring & Engagement

- Set up social listening tools
- Create engagement tracking system
- Plan proactive engagement strategy
- Define comment moderation guidelines
- Establish DM management process
- Create FAQ document
- Plan community events/activities
- Set up competitor monitoring

Analytics & Reporting

Setup & Tracking

- Set up tracking tools
- Define KPIs for each platform
- Create reporting templates
- Set up automated tracking where possible
- Establish benchmark metrics
- Configure conversion tracking
- Set up UTM parameters
- Install pixel tracking

Reporting Structure

- Define reporting frequency
- Create executive summary template
- Set up performance dashboards
- Define optimization triggers
- Create ROI tracking system
- Plan A/B testing schedule
- Establish feedback loop process
- Create performance improvement protocol

Paid Social Strategy

Campaign Planning

- Define paid social budget allocation
- Create campaign calendar
- Set up audience targeting templates
- Plan A/B testing strategy
- Create ad creative guidelines
- Establish bidding strategy
- Define conversion goals
- Plan remarketing campaigns

Management & Optimization

- Set up campaign tracking
- Create optimization schedule
- Define budget adjustment triggers
- Plan audience refinement strategy
- Create performance threshold alerts
- Establish scale-up criteria
- Define campaign end criteria
- Plan cross-platform attribution

Compliance & Security

Policy & Regulations

- Review platform policies
- Check industry regulations
- Create compliance checklist
- Document privacy guidelines
- Review copyright requirements
- Create disclosure guidelines
- Plan contest/promotion rules
- Document data handling procedures

Security

- Set up two-factor authentication
- Create password management protocol
- Define access level hierarchy
- Document security procedures
- Create backup protocol
- Plan recovery procedures
- Set up monitoring alerts
- Create security audit schedule

Regular Maintenance

Monthly Tasks

- Review and update strategy
- Analyze performance metrics
- Update content calendar
- Conduct competitor analysis
- Review audience insights
- Update hashtag research
- Check platform updates/changes
- Optimize posting schedule

Quarterly Tasks

- Conduct comprehensive performance review
- Update benchmark metrics
- Revise strategy as needed
- Review and update templates
- Assess tool effectiveness
- Update best practices guide
- Conduct team training
- Plan next quarter's initiatives

Action Items for Implementation

1. Schedule monthly planning sessions
2. Create content batches bi-weekly
3. Review analytics weekly
4. Update strategies quarterly
5. Conduct platform audits semi-annually

Remember to customize this checklist based on your specific market, target audience, and business goals. Regular review and updates will ensure your social media strategy remains effective and aligned with current trends and best practices.

Ready to scale your agency's social media game and deliver results faster? Try quso.ai today and see how effortless managing social media for your clients can be

[SIGN UP TODAY!](#)

