

Social Media and Content Strategy Client Questionnaire Worksheet

Section	Field	Details to Fill	Answers
1. Business Objectives	Business Overview	What are your primary business goals?	
	Products/Services	What products/services do you offer?	
	Competitive Advantage	What makes you unique from competitors?	
	Business Success Metrics	How do you currently measure business success?	
2. Target Audience	Ideal Customer	Define your ideal customer (demographics, behaviors, interests).	
	Pain Points/Needs	What problems are you solving for your audience?	
	Customer Personas	Provide details on customer personas (if any).	
	Audience Platforms	Which platforms does your audience use?	
	Secondary Audiences	Who are your secondary	

		audiences?	
3. Competitor Analysis	Main Competitors	List your main competitors.	
	Competitor Strategy	How do your competitors approach social media and content?	
	Market Gaps/Opportunities	What gaps or opportunities do you see in the market?	
	Brand Positioning	How do you compare to competitors?	
4. Social Media Channels	Platforms Used	What social media platforms are you currently using?	
	Platform Goals	What are your goals for each platform?	
	Platform Engagement	Which platforms perform best for your brand?	
	Underperforming Platforms	Are there platforms that underperform?	

5. Content Strategy	Brand Voice	Define your brand's tone and messaging.	
	Key Messages	What key messages/themes do you want to convey?	
	Emotional Connection	How do you want your audience to feel?	
	Content Formats	What content formats do you want to prioritize?	
	Content Mix	What mix of content types will you use (educational, promotional)?	
	Content Pillars	List 3-5 key content themes for your brand.	
6. Engagement Strategy	Audience Engagement	How will you engage with your audience?	
	Interaction Methods	What tactics will you use to foster interaction?	
	Community Management	How will you build and manage a community?	

	Negative Feedback Plan	How will you handle negative feedback?	
7. Paid Social Strategy	Advertising Budget	Define your budget for social ads.	
	Advertising Platforms	Which platforms will you use for advertising?	
	Audience Targeting	Define your target audience segments.	
	Campaign Types	What types of ad campaigns will you run?	
8. Success Metrics	Key Performance Indicators	List your primary KPIs (engagement, conversions, reach, etc.).	
	Analytics Tools	What tools will you use to track performance?	
	Reporting Frequency	How often will you review performance (weekly, monthly)?	
	Adjustments Based on Data	How will you use insights to adjust	

		strategy?	
9. Implementation Timeline	Phases of Rollout	Define key milestones and dates for strategy implementation.	
	Content Calendar	Outline your posting schedule (daily, weekly, etc.).	
	Resource Allocation	Who is responsible for content creation and management?	
10. Customer Journey	Funnel Stages	What content fits each stage of your customer funnel?	
	Lead Generation Methods	How will you generate leads on social media?	
	Conversion Optimization	What steps will you take to optimize conversions?	
11. Growth & Optimization	Audience Growth Tactics	What methods will you use to grow your social following?	

	Experimentation & Testing	What will you test (content formats, audiences, etc.)?	
	Regular Reviews & Optimization	How often will you review and optimize your strategy?	
12. Budget & Resources	Overall Budget	What is your total budget for social media marketing?	
	Resource Allocation	How will you allocate resources across platforms and content?	
	Team & Tools	List any teams or tools you'll use for management.	
13. Risk Management	Potential Risks	What risks do you foresee in social media campaigns?	
	Crisis Management Plan	Outline your plan for managing a PR crisis on social media.	