



Template: Social Media Automation Checklist

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Based on Article: "Maximizing Engagement: How to Automate Your Social Media Posts"

A practical checklist for automating your social media posts to maximize engagement and efficiency.

Checklist Items:

- ☐ **1. Prepare Essential Accounts and Access**
Ensure you have access to team workspace tools like Slack or Microsoft Teams, CMS accounts for publishing, social platform logins (admin-level), and analytics access for better insights.
Reference Section: Prerequisites and What You'll Need
- ☐ **2. Create and Standardize Assets**
Prepare images in the correct dimensions (e.g., 1200x628 px for link previews) and write consistent captions and CTAs for posts, ensuring each has UTM parameters for tracking.
Reference Section: Prerequisites and What You'll Need
- ☐ **3. Set Up Templates**
Develop editorial brief templates and social caption templates that include hashtags and UTM snippets to streamline content creation and maintain consistency.
Reference Section: Prerequisites and What You'll Need
- ☐ **4. Choose Key Engagement Goals and KPIs**
Define your primary KPI and two to three secondary KPIs for measuring engagement, ensuring they are tied to business objectives and trackable through analytics.
Reference Section: Step 1 — Define Your Engagement Goals and KPIs
- ☐ **5. Capture Baseline Metrics**
Export analytics data from the past 30 days to establish baseline values for your chosen KPIs. Validate the definitions and document the time range used.
Reference Section: Step 1 — Define Your Engagement Goals and KPIs
- ☐ **6. Set SMART Targets for Engagement**
Formulate specific, measurable, achievable, relevant, and time-bound targets for your KPIs, ensuring they guide your campaign effectively within 90 days.
Reference Section: Step 1 — Define Your Engagement Goals and KPIs
- ☐ **7. Select Appropriate Automation Tools**
Choose the right scheduling or automation tools based on your team's needs. For minimal setup, opt for cloud scheduling; for high-volume needs, consider API-first automation.
Reference Section: Recommended scheduling tool categories

☐ **8. Document and Implement Time Estimates**

Estimate time for initial setup of accounts and ongoing content preparation. Plan resources around 3-6 hours for setup and 45-90 minutes for content prep per post.

Reference Section: Time estimates and difficulty

☐ **9. Run Initial Engagement Tests**

Conduct A/B tests on your content strategies and measure against your baseline metrics to evaluate performance and refine your approach.

Reference Section: Expected outcomes and checkpoints