



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