

# Social Media Audit Spreadsheet

Purpose: a complete, fill-in audit for a small business with up to five social accounts. Create one spreadsheet with the tabs below (one tab per section). Columns are separated by " | ". Rows in [brackets] are for you to complete.

## TAB 1: Business goals (do this first)

| Goal (max 2)                | How we will know (measure)             | Target by [date] |
|-----------------------------|----------------------------------------|------------------|
| [e.g. More local enquiries] | [Messages and calls mentioning social] | [10 a month]     |
| [e.g. Recruit a driver]     | [Applications from social]             | [3]              |

## TAB 2: Account inventory

Columns: Platform | Handle / URL | Owner (named person) | Who has admin access | Login email | Status (active / quiet / abandoned) | Followers today | Decision (keep / placeholder / close)

Platforms to search for your business name on: Facebook, Instagram, TikTok, LinkedIn, YouTube, X, Pinterest, Google Business Profile, Threads, WhatsApp Business.

## TAB 3: Profile checks (score 2 = good, 1 = needs a tweak, 0 = missing or wrong)

Columns: Check | Facebook | Instagram | TikTok | LinkedIn | Google Business Profile | Other

Rows:

1. Business name matches other platforms
2. Handle is the same or very close everywhere
3. Profile picture is the current logo and clear on a phone
4. Cover / header image is current and sized correctly
5. Bio says what we do, where, and for whom
6. Phone number correct
7. Email correct
8. Address / service area correct
9. Opening hours correct (including bank holidays)
10. Website link works and lands on a relevant page
11. Link has tracking (for example UTM tags) so visits show in website analytics
12. Call-to-action button set (Book, Call, Shop, Message)
13. Pinned / featured content is current
14. Highlights or featured sections are tidy
15. Categories and services listed correctly

Total score (out of 30 per platform): ☐

## TAB 4: Security and access

Columns: Check | Facebook | Instagram | TikTok | LinkedIn | Google Business Profile | Email account | Done by | Date

Rows:

1. Two-step verification is on (authenticator app preferred, text message better than nothing)
2. Backup codes saved somewhere safe
3. Login email is a business address we control
4. Recovery phone number is current
5. Password is unique and stored in a password manager
6. Former staff and ex-agencies removed from access
7. Everyone with access has the lowest level they need (not everyone needs full control)
8. At least two trusted people can regain access if one leaves
9. Third-party apps and tools connected are still needed (remove the rest)
10. Last login review done (check unfamiliar devices)

### **TAB 5: 90-day results (one row per platform)**

Columns: Platform | Followers at start | Followers at end | Net growth | Reach or views (90 days) | Posts published | Average reach per post | Likes + comments + shares + saves | Engagement rate (see formula) | Profile visits | Link clicks | Messages received | Enquiries or sales traced to social | Notes

Engagement rate formula (pick ONE and use it every time):

- Engagement rate by reach = (likes + comments + shares + saves) / reach x 100
- Engagement rate by followers = (likes + comments + shares + saves) / followers x 100

Compare each account with its own past, not with other platforms.

### **TAB 6: Content review (last 20 to 30 posts per platform)**

Columns: Date | Platform | Format (photo / video / carousel / story / text) | Topic group (educate / show work / show people / ask or sell) | Hook or first line | Reach | Engagement | Comments | Saves or shares | Link clicks | Call to action? (Y/N) | Top 3 / Bottom 3 | What we learned

Summary questions (answer in two lines each):

1. What do our best three posts have in common?
2. What do our worst three have in common?
3. Which topic group do we overuse? Which do we ignore?
4. Which format gets the best response?
5. What day and time did the best posts go out?
6. Were there gaps of more than 7 days without posting?
7. Are any posts adverts (paid, gifted or affiliate) that are not clearly labelled at the start?

### **TAB 7: Audience and conversation**

Columns: Question | Answer | Evidence

1. Who is actually engaging (customers, prospects, staff, suppliers, strangers)?
2. Top 3 locations of the audience
3. Top 5 questions asked in comments or messages in the last 90 days

4. Top 3 compliments
5. Top 3 complaints
6. Any sudden unexplained follower jumps (date and size)? Check for fake followers
7. Average time to reply to comments / messages (hours)
8. Messages that never got a reply (count)

### **TAB 8: Competitor snapshot (3 rows)**

Columns: Competitor | Platforms | Posts per week | Main formats | Best-performing post type | What they do that we do not | Gap we could fill

### **TAB 9: Brand consistency (score 0 to 2)**

Rows: Logo consistent | Colours consistent | Tone of voice consistent | Description of services consistent | Same photography style | Alt text added where possible | Hashtags relevant and not overused | Replies sound like us

### **TAB 10: Action plan**

Columns: Priority (1 to 5) | Action | Why it matters | Owner | Deadline | How we will know it worked | Done?

List of "Fix now" examples: update opening hours; remove ex-staff access; turn on two-step verification; fix broken link in bio; correct phone number.

List of "Improve this month" examples: rewrite bios; replace profile image; set a posting rhythm; reply within 24 hours; pin best post.

List of "Rethink this quarter" examples: drop a platform with no results; test a new format; plan a monthly content calendar; set a monthly reporting routine.

### **TAB 11: Stop / Start / Continue**

Columns: Stop | Start | Continue

Write three entries in each column.

### **Repeat dates**

- Quick check (numbers and access): every 3 months. Next: [date]
- Full audit: every 12 months, or after any rebrand, staff change or unexplained results drop. Next: [date]

#### **Want a hand putting this into practice?**

Delivered Social is a social media, SEO and web agency based in Guildford and Portsmouth. Say hello at [deliveredsocial.com/contact/](https://deliveredsocial.com/contact/) and we will point you in the right direction.