

The Social Audit

A simple, step-by-step guide to checking,
fixing and future-proofing your social media.

successful socials start here



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successful socials start here



Welcome

Most of us treat social media like a treadmill. We post, we hope, we repeat. Weeks turn into months, and one day we realise our bio is out of date, our link is broken, and we can't remember what our content was meant to achieve.

This handbook fixes that. A social media audit is a regular health check of your profiles, content and results. It shows you what is working, what is not, and what to do next. It does not need expensive software or a marketing degree. It needs an hour, a coffee and a willingness to look at your accounts the way a brand-new customer would.

Who this is for: Small business owners, creators, in-house marketers and anyone running their own socials who wants an achievable approach.

How to use it: Work through the chapters in order, one platform at a time. Each chapter ends with an action checklist. Tick things off, make notes in the margins, and finish with the 30-day plan at the end.

CHAPTER 1

Why you need a SMA.

A social media audit is a structured review of everything connected to your social presence: your profiles, your content, your audience, your results and your strategy.

Why it matters

- It saves time. You stop doing things that do not work.
- It saves money. You can see which efforts are worth paying for.
- It builds trust. Consistent, accurate profiles feel professional and reliable.
- It brings clarity. You know what each platform is for and how to measure it.

How often to audit

- A full audit once or twice a year.
- A quick check every quarter (bio, links, top posts, goals).
- A spot check before any major launch or campaign.

Before you start, gather:

1. A list of every account you own, including old and forgotten ones.
2. Login details (and who else has access).
3. Access to analytics or insights for each platform.
4. Your business goals for the next 3 to 12 months.

Your notes: List every account you currently have

CHAPTER 2

Setting Social Goals

An audit without goals is just a tour of your accounts. Before you check anything else, decide what success looks like.

Choose one main goal per platform:

- Awareness: getting seen by new people.
- Engagement: building a community that interacts.
- Traffic: sending people to your website or shop.
- Leads: collecting enquiries, sign-ups or bookings.
- Sales: driving direct purchases.
- Support or reputation: answering questions and building trust.

Make goals specific. Instead of "grow my Instagram," try "gain 300 new followers and 50 link clicks per month over the next quarter."

Action checklist

- One main goal chosen for each platform
- Goals written as numbers with a time frame
- You know which metric tracks each goal

Your notes: Write your goal for each platform here.

CHAPTER 3

Audit all of your profiles

Your profile is your shopfront. If it is confusing, people keep scrolling. Check every platform for the following.

Name and handle

- Is it consistent everywhere? The same (or very similar) handle makes you easy to find.
- Is it easy to spell, say and remember?
- Does the display name include a searchable keyword where it makes sense?

Profile photo and cover image

- Use a clear logo or face that still reads at thumbnail size.
- Keep it consistent across platforms.
- Update cover images and pinned content for current offers and seasons.

Business details

- Is your business category correct?
- Are your email, phone number, location and opening hours accurate?
- Is your website listed in the right field?
- Are action buttons (book, shop, call, email) switched on and working?

Platform-specific features

- Pinned posts or featured content
- Story highlights with clear titles and covers
- Shop or product tags
- Verified or professional account settings

Action checklist

- Name and handle consistent
- Profile photo clear and on brand
- Cover image or highlights up to date
- Contact details and category correct
- Buttons and features switched on

CHAPTER 4

Write a bio that converts

Your bio has about three seconds to answer one question: "Why should I follow this account?"

The simple formula

Who you help + what you do + what to do next.

Example: "Helping small businesses grow with simple social media. Tips, templates and strategy. Free guide below."

Add keywords (without stuffing)

Social platforms use the words in your name and bio to understand who you are and who should see you. Include the terms your ideal customer would actually search, such as "social media manager Melbourne" or "handmade candles." One or two clear keywords beat a bio packed with buzzwords.

Do

- Use plain language a stranger understands instantly.
- Include your location if you serve a local area.
- End with a clear next step.
- Use line breaks and a few emojis for readability, if they suit your brand.

Do not

- Use vague slogans such as "making magic happen."
- Cram in every product or service you offer.
- Leave out what you actually do.

Tone check

Read your bio out loud. If it does not sound like your brand, rewrite it.

Action checklist

- Bio says who you help, what you do and what to do next
- One or two relevant keywords included
- Location added if relevant
- Tone matches your brand

Your notes: Draft your new bio here (one version per platform).

CHAPTER 5

Audit your links and external destinations.

Broken, slow or vague links are one of the most common audit findings, and one of the costliest.

Check these

1. Click every link yourself, on your phone. Does it load quickly? Does it go where you said it would?
2. Point to one clear priority. Your website, a booking page, a lead magnet or your newest product.
3. Use a link page carefully. If you have several things to share, a simple link hub is fine, but put your top priority first and keep it tidy.
4. Match your bio and your link. If your bio says "free guide below," the link should take people straight to the guide.
5. Update seasonally. Expired offers make an account feel neglected.
6. Cross-promote your other products and platforms. Mention your podcast, shop, newsletter or other accounts so followers can find everything you offer.
7. Track your links. Use tracking parameters or a link tool so you can see which platforms actually send traffic.

Check the destination too. Is the landing page mobile friendly? Does it have a clear headline and one obvious action? A great social post that leads to a confusing page is wasted effort.

Action checklist

- Every link tested on mobile
- Link matches the promise in your bio
- Priority offer is first
- Other products and platforms mentioned
- Links are being tracked

CHAPTER 6

Audit your content

Now look at what you have been posting. Scroll back through your last 15 to 30 posts on each platform and answer the questions below.

Quality and relevance

- Does each post serve your audience, or only you?
- Is the content on brand in look, tone and message?
- Are images and videos clear, well lit and easy to read on a phone?

Variety

- Do you use a healthy mix of formats (video, carousels, images, stories, text posts)?
- Is there a balance between educating, entertaining, inspiring and promoting?

Performance

Sort by results and look at your top five and bottom five posts.

Ask:

- What topics, formats or styles did the top posts share?
- What did the bottom posts have in common?
- Is there something you should clearly do more or less of?

Action checklist

- Last 15 to 30 posts reviewed per platform
- Top five and bottom five posts identified
- Three "do more of this" lessons written down
- Three "stop doing this" lessons written down

Your notes: What do your best-performing posts have in common?

CHAPTER 7

Captions and CTA's

Great content without a call to action (CTA) leaves people wondering what to do next. Your caption is where you guide them.

Audit your captions

- Hook: Does the first line grab attention before the "see more" cut-off?
- Value: Is the caption useful, interesting or entertaining?
- Voice: Does it sound like one consistent brand?
- Length: Does it suit the platform and the topic?
- CTA: Is there one clear next step?

The one post, one action rule

Do not ask people to like, comment, share, save, click and DM all at once. Choose the single action that matters most for that post.

CTA examples you can adapt

To start a conversation

- "Which tip will you try first? Tell us below."
- "What would you add to this list?"

To get saves

- "Save this for your next content planning session."
- "Bookmark this checklist for later."

To get shares

- "Send this to a business owner who needs it."
- "Tag someone who would love this."

To drive clicks

- "Grab the free checklist via the link in our bio."
- "Read the full guide on our website, link in bio."

To convert

- "Ready to get started? Send us a DM."
- "Book your free chat today, link in bio."

A simple caption structure

- 1.Hook: a bold statement or question.
- 2.Body: the value, story or tip.
- 3.CTA: one clear next step.
- 4.Hashtags or keywords: a small, relevant set.

Action checklist

- Hooks reviewed and rewritten where weak
- Every post has one clear CTA
- CTAs match the post goal
- A bank of go-to CTAs saved for easy reuse

CHAPTER 8

Build a strategic content plan.

Posting without a plan is how accounts burn out. Your audit should tell you whether your content has direction.

The five parts of a strategic plan

1. Audience

Can you describe who you are speaking to in a sentence? If not, your content is probably not speaking to anyone. Note their problems, questions and where they spend time.

2. Goals

Use the goals you set in Chapter 2. Every post should connect to one of them.

3. Content pillars

Choose three to five themes you return to regularly. For example:

- Education and tips
- Behind the scenes
- Customer stories and proof
- Products and offers
- Personality and values

4. Formats and frequency

Pick formats you can produce well and a posting rhythm you can maintain. Three solid posts a week beats seven rushed posts followed by silence.

5. Calendar

Plan at least two to four weeks ahead, including launches, holidays, events and seasonal moments.

Sample weekly rythym

Day	Pillar	Format	CTA
Monday	Education	Carousel	Save this post
Wednesday	Behind the scenes	Short video	Comment your question
Friday	Offer or product	Image or reel	Link in bio

Repurpose to save time

Turn one idea into several pieces: a blog post becomes a carousel, a short video, a quote graphic and a newsletter mention.

Action checklist

Audience described in one sentence

Three to five content pillars chosen

Posting frequency decided

Four-week calendar created

Repurposing plan in place

Your notes: Write your content pillars and weekly rhythm here.

CHAPTER 9

Do not drown in data.

Do not drown in data. Pull the last 30 to 90 days of insights and look for patterns.

Here are the metrics that matter:

Goal	Metrics to watch
Awareness	Reach, impressions, follower growth
Engagement	Saves, shares, comments, engagement rate
Traffic	Link clicks, website visits from social
Leads	Sign-ups, enquiries, DMs
Sales	Conversions, revenue from social

Questions to ask

- Which posts drove the most saves, shares and clicks?
- Are you reaching new people or the same audience?
- When is your audience most active?
- Which platform sends the most valuable traffic?
- Are you moving closer to the goals you set?

A note on vanity metrics: likes are nice, but saves, shares, DMs and clicks show real interest. Judge your accounts on the metrics tied to your goals.

Action checklist

- 30 to 90 days of data reviewed
- Metrics matched to each goal
- Best posting times identified from your own data
- Key numbers recorded as a baseline

Your notes: Record your baseline numbers here (followers, reach, engagement rate, link clicks).

CHAPTER 10

Check engagement and community.

Social media is a conversation, not a noticeboard.

- Response time: Are you replying to comments and DMs promptly?
- Proactive engagement: Are you commenting on other accounts, not just posting and leaving?
- Community content: Are you re-sharing customer posts, tags and mentions?
- Housekeeping: Have you cleared spam and answered open questions?
- Reputation: Are reviews and feedback being addressed?

Set aside ten minutes a day purely for engagement. It is one of the simplest ways to grow.

Action checklist

- Unanswered comments and DMs cleared
- Daily engagement time scheduled
- Customer content saved and shared with permission

Hashtags, Accessibility and brand consistency.

Hashtags

- Use a small, relevant mix rather than a huge block.
- Combine broad, niche and branded tags.
- Review which tags actually bring reach and drop the rest.

Accessibility

- Add alt text to images.
- Add captions to videos.
- Capitalise each word in multi-word hashtags (#SmallBusinessTips) so screen readers can read them.
- Check colour contrast and keep text readable.

Brand consistency

- Do your colours, fonts, tone and visuals feel cohesive across platforms?
- Do you have simple brand guidelines that anyone posting for you can follow?

Action checklist

- Hashtag sets reviewed and refreshed
- Alt text and captions in use
- Brand look and tone consistent

CHAPTER 12

Learn from your competitors.

You are not copying, you are learning. Pick two or three similar businesses and note:

- What they post and how often
- Which content gets the most engagement
- How they write bios and CTAs
- What they are missing that you could offer

Then ask: where could you be clearer, more helpful or more fun?

Action checklist

- Two to three competitors reviewed
- Three opportunities or gaps identified

CHAPTER 14

Security and housekeeping.

Protect what you have built.

- Remove old, unused or duplicate accounts.
- Update passwords and use a password manager.
- Turn on two-factor authentication everywhere.
- Review who has admin access and remove anyone who no longer needs it.
- Check tagged posts and archive anything off-brand.
- Confirm you know how to recover each account if you are locked out.

Action checklist

- Two-factor authentication enabled
- Access list reviewed
- Old accounts closed or updated
- Recovery details up to date

CHAPTER 15

Your Audit Scorecard.

Rate each area from 1 (needs work) to 5 (excellent) for each platform. Anything scoring 1 to 3 becomes a priority.

Download this for FREE on our website.

Area	Instagram	Facebook	LinkedIn	TikTok	Other
Profile basics					
Bio and keywords					
Links and destinations					
Content quality					
Captions and CTAs					
Content plan					
Analytics and goals					
Engagement					
Accessibility and brand					
Security					

Your 30 Day Action Plan.

Week 1: Fix the basics

- Update names, photos, bios and keywords.
- Test and fix all links.
- Turn on two-factor authentication.

Week 2: Sharpen your content

- Rewrite weak captions and add clear CTAs.
- Choose your content pillars.
- Create a bank of reusable CTAs.

Week 3: Plan ahead

- Build a four-week content calendar.
- Batch create or schedule your first two weeks of posts.
- Set your engagement routine.

Week 4: Measure and refine

- Record your baseline metrics.
- Review early results against your goals.
- Note what to adjust for next month.

Master Audit Check-list

1. Consistent name, handle and profile photo
2. Clear bio with who, what and next step
3. Relevant keywords in name and bio
4. Working links that match the bio
5. Other products and platforms cross-promoted
6. Contact info and business category up to date
7. Goals set for every platform
8. Strong hooks and one clear CTA per post
9. Content pillars and a content calendar
10. Analytics reviewed and baseline recorded
11. Replying to comments and DMs
12. Hashtags, alt text and captions in place
13. Competitors reviewed
14. Security and access checked

Our final thoughts

A social media audit is not about perfection. It is about clarity: knowing who you are talking to, what you want them to do, and whether your accounts make that easy. Audit quickly each quarter, make a few small changes, and your presence will feel stronger, more consistent and far more effective.

About SMALL GIANT Media

Small Giant Media helps brands show up with confidence on social media. Need a hand with your audit, content plan or ongoing management? Get in touch with our team and let's talk about what is possible for your brand.

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