

# SaaS Social Media Strategy Checklist

This checklist is designed to help you execute the steps required to launch and optimize your SaaS social media strategy.

## Phase 1: Planning and Foundation

- Define your ICP's social behavior and pain points.** Clearly identify the job titles and core challenges of the decision-makers you are trying to reach.
- Establish S.M.A.R.T. objectives.** Set measurable goals for lead generation (e.g., target CPL), traffic growth (e.g., target CTR), and brand trust for the next quarter.
- Prioritize LinkedIn.** Confirm your primary resources are focused here, as 75% of B2B buyers consult social media before a purchasing decision.
- Determine content fit for secondary channels.** Decide if YouTube (for demos) or Reddit (for niche feedback) aligns with your product's needs.
- Commit to one or two platforms initially.** Do not spread resources too thin; master one high-value channel before expanding.

## Phase 2: Optimization and Content Setup

- Audit your main LinkedIn company page.** Ensure your description is keyword-optimized and aligns with your B2B SaaS positioning and messaging framework.
- Verify all brand visuals are high-resolution.** Check that your logo and cover images look professional on both desktop and mobile devices.
- Fully utilize the LinkedIn Products Page.** Add detailed descriptions, relevant customer job titles, and high-quality product videos to boost visibility.
- Analyze top 3-5 competitor content formats.** Identify gaps in their strategy (e.g., lack of video) that your brand can exploit.

- Define 4-6 evergreen topic pillars.** Center these main ideas around your customer's biggest pain points and primary product use cases.
- Create a content repurposing menu.** Plan to convert one long-form asset (e.g., a blog post) into at least three different social formats (e.g., carousels, video clips, data posts).
- Schedule founder-led content (1-2x per week).** Ensure a key executive is consistently posting authentic, expert insights to build trust.

### **Phase 3: Execution, Governance, and Measurement**

- Document clear social media guidelines.** Define your brand's tone (e.g., "authoritative"), rules for emoji use, and hashtag policies to ensure consistency.
- Implement a social listening process.** Assign a team member to monitor comments and mentions daily, ensuring prompt brand engagement and issue flagging.
- Launch an employee advocacy initiative.** Encourage all team members to share company posts on their personal LinkedIn accounts to leverage their credibility.
- Set up consistent UTM tracking links.** Ensure every social media link is properly tagged so you can accurately measure traffic and conversions in your analytics.
- Review CTR and CPL bi-weekly.** Use this data to quickly stop underperforming paid ads and prioritize high-engagement organic content formats.
- Validate Conversion Rate from social traffic.** Confirm that the traffic driven by social media is converting into high-value actions (demo requests, trials) at a rate that justifies the effort.
- Adjust posting schedule based on audience activity data.** Post content when your specific audience demographics are most active on the chosen platform.